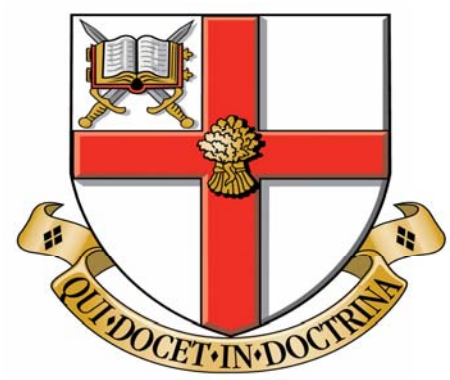

University of Chester

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BECOMING A MANAGER IN A CONTACT CENTRE

Thesis submitted in accordance with the requirements of the University of Liverpool for the degree of Doctor of Philosophy

by

Peter John Cureton

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To the twelve participants whose stories are told here. Thank you for your openness, your honesty and accommodating me so well. The citizens in your community should be very grateful for the way you approach your work and support your staff, as you provide excellent service.

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This thesis bears testimony to the skill and experience of my supervision team, and not least their patience with an apprentice researcher. Thank you. I truly could not have produced this thesis without your excellent support.

And finally if I may edit the dedication of Sir Edward Elgar to his violin concerto (itself taken from the novel Gil Blas by Lesage)

Aqui está encerrada el alma de . . . . . . Audrey

She knows . . .

ABSTRACT

This thesis uses an abductive research strategy to discover how individuals in a UK contact centre became first-line managers. Managers play a significant role in organisations as supervisors of staff, yet there is no general agreement as to what they do or how. Adopting an idealist ontology and a constructionist epistemology, this ethnographic project uncovered stories of becoming by using questionnaires, observations and interviews with twelve participants.

The context was a private / public sector partnership to provide advice and guidance to a local community. The use by organisations of contact centres is maturing in the private sector and growing in the public sector. It is an especially important arena to explore in the UK economy as currently many contact centres that were outsourced to cheaper, high quality labour markets are returning to the UK.

Analysis of data showed clearly that learning to become a first-line manager occurred throughout the life course in three distinct stages; formative development, and reflecting the values and behaviours of parents and teachers; pre-management occupational development, and the experience of being managed; and development actually in the role of a first-line manager. The thesis makes four contributions to the extant literature. Firstly, these three stages were shown to be the route in the transition from legitimate peripheral participation to mastery. Situated learning theory provides no such clarification. Secondly, learning to become a first-line manager did not necessarily change identity as many writers claim. Identities of first-line manager evolved by building on personal and occupational identities that had been developed earlier. Thirdly, teachers made a vital contribution to developing future first-line managers by affirming and strengthening family values. They also encouraged their pupils to recognise the connection between effort and gaining reward for achievement. Finally, the messy terrain of learning theory has been clarified, not as grand theory, but as mid-range theorising through a new conceptual framework. This schema synthesizes learning orientations with learning metaphors and learning viewed as a noun or a verb, and the various influences on learning from structure and agency. The four learning modes are adapt, assimilation, accommodation and aspire.

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CHAPTER 1 INTRODUCTION

1.1 Introduction

This chapter introduces the thesis by outlining and describing the research problem which is to discover how an individual becomes a first-line manager in a contact centre. This is an important study as managers and their work have been extensively researched without reaching general agreement about the nature of the role. Contact centres are increasingly used by organisations to manage customer interactions, particularly in the public sector. This is also a complex study as it requires an exploration of two dense cognitive terrains, learning and identity. To clarify the scope of this broad investigation, research objectives will be specified. The chapter then introduces the study context, justifying the choice of this occupational sector generally and the particular organisation. The chapter concludes with an outline plan of the thesis with a résumé of each chapter, and summarises the four contributions that this study makes to the corpus of extant knowledge.

1.2 The research problem

First-line managers are perceived by some employers as a link between an organisation's senior management and its operational staff. The popular image of a manager, certainly judged by texts found in "endless airport book shops" (Parker & Pearson, 2005, p.95) is that they translate strategy and policy into practice, respond to change, and deal with higher order technical queries from their staff. However, the nature of the manager role is contested. Writers such as Drucker (1979), Watson (1986) and Ramirez and Mabey (2005) for instance propose differing definitions of the term. The dominant perspective characterises the role as a rational approach to enforce regulations and exercise power over others to achieve organisational aims. By contrast, a postmodern stance emphasises ambiguity, fragmentation and change. Analysing the domain is confused further as literatures tend to treat the different levels of manager equally without recognising significant differences in the role: there are different emphases in the role of a first-line manager and a chief executive. This study will show that there is no universal blueprint for being a manager as management needs to be understood in a specific context.

Performing the role of a manager requires individuals to have specific knowledge and skills, yet the process of any human learning is messy (Hermanson, 2009). Learning is a crowded, dense terrain (Dixon, Adams, & Cullins, 1997) and a study of it draws on many perspectives.

As such, I need to 'tidy' the range of extant literature through a critical analysis of orientations to and metaphors for learning to reveal distinct processes of learning to become a first-line manager. Many writers (for example Hill, 1992; Billet & Somerville, 2004) assert that learning changes identity, yet what emerges from this study is a rich picture of learning that challenges such a notion. Identity, like learning, is a vast area of study that will be explored. Influences on both the processes of learning throughout the life course and identity formation will be examined as these shape the use of different modes of learning and contribute to the ways in which individuals build 'identity layers' to their persona. Personal identity is a foundation upon which occupational identity is built, leading to a final layer of manager identity.

1.3 Rationale for the thesis

This thesis is a personal exploration of the nature of learning as it challenges the practices I have adopted in my career which were based on taken-for-granted assumptions of learning and training in particular as intrinsically 'good things'. The major part of my working life has been spent in the field of learning and development and the research conclusions have significant implications for the remainder of my career and my epistemological stance to learning. It is for this reason that it is written in the first person. To illustrate these points in the rationale for the thesis, I will start with a personal story.

In the mid-1980s I was asked to pilot a new role of a training officer in a branch of a major insurance company. My manager simply told me to "find out about the job, write the job description drawn from your experiences of working in a local branch and then launch a national project to establish a training officer in each of the 62 UK branches". Whilst I had experienced training programmes as a trainee and had completed my insurance education as an Associate of the Chartered Insurance Institute, my involvement in training had been limited to supporting others who trained junior colleagues. Whilst I enjoyed that aspect of my work, I felt unprepared to assume a full-time role as a trainer. There were no internal specialists for guidance and there were few key text books on the topic, possibly limited to Nadler (1970) and Stammers and Patrick (1975). Rosemary Harrison's standard reader in the topic would not be published until 1988. Currently there are believed to be in excess of 500 texts on the topic (Cureton & Stewart, 2014).

I muddled through organising technical insurance training and engaged in a project with British Telecom to develop sales and customer handling skills of staff. With my business background I was interested to discover whether the training had increased sales and wrote

a short paper to my managers to show that the training had recouped its outlay by a factor of five within three months. This was done without any knowledge of training evaluation – I was at that stage naïve about the work of Kirkpatrick (1959). I had, however, proved a link between training and performance, an issue that would astonish me later. Whilst the first part of my assignment in a local branch, was progressing well, I felt underprepared to scale the project nationally. I sought help from a consultancy organisation that provided training for trainers, Guardian Business Services (GBS), at that time a division of Guardian Media Group. I met John Anderson, an ex-RAF trainer, who introduced me to systematic approaches to training, instructional technique and models of evaluation. I applied my learning by writing the job description for a branch training officer and established a network of 62 national trainers who were in turn trained by John Anderson. Following compulsory redundancy from a training manager position, I became an independent training consultant and delivered courses in the UK and occasionally in continental Europe with a strong focus on improving performance through learning. My experiences enabled me to take a position in education, teaching on professional programmes mainly for the Chartered Institute of Personnel and Development but also Chartered Management Institute and the Chartered Institute of Purchasing and Supply.

As a soit-disant academic (although I have never been comfortable with this appellation) I needed to gain a qualification above my Master's degree to secure my future employability. My first PhD proposal was based on a project to further the links between performance and behavioural dimensions. I intended to use SHL Ltd.'s psychometric instruments, developed from Cattell's 16PF (Cattell & Eber, 1972) and isolate those behaviours that had strong associations with high performance work practices (Becker & Huselid, 1998) using multivariate analysis. However, studying Valentin's (2006) widely cited, seminal summary of critical approaches to HRD enquiry became a true personal epiphany. I realised, with some feelings of self-reproach that when viewed through a critical HRD lens, I had spent more than twenty years in training and development simply increasing course attenders' knowledge and skills for employers to leverage more productivity from them. The alternative viewpoint that I had helped individuals to feel confident in their roles to progress their careers did not occur at that time, despite my personal transition from a trainer to become an educator.

I abandoned my initial project to develop this thesis as I wanted to learn more about critical HRD and the use of power and controls in organisations. In some ways this was for a sense of catharsis as I wished to discover how an individual learns to become a first-line manager in a contact centre *from their personal perspective*. This would redress what I perceived to be my years of supporting a managerialist agenda.

The choice of a research strategy also gave me an opportunity to investigate a research strategy that some writers (Gold et al., 2011) suggest should be more widely used. Abduction is based on Peirce's 'hypotheses on probation'. According to Peirce et al. (1998 p.216), "Deduction proves that something must be; Induction shows that something actually is operative; Abduction … suggests that something may be". An abductive strategy overcomes the problems inherent in inductive approaches as a researcher cannot forget or ignore knowledge that he already possesses. The strategy, which is also known as iterative induction or retroduction, allows freedom to explore data with the theory and theory with the data through iterative layers of analysis.

1.4 Research aim and objectives

The aim of this thesis is to discover how an individual becomes a first-line manager in a contact centre is too broad and needs to be clarified more specifically as research objectives. These have been developed abductively from both the emerging data and from a systematic review of literature:

1. Clarify the nature of the first-line manager role in a specific contact centre
2. Identify how individuals learn to become a first-line manager
3. Discover influences that affect learning to become a first-line manager
4. Examine links between learning and identity

As I have identified the confusion over differing stances on management, the exact nature of the manager role needs to be examined *sui generis* before I can understand how this was learned. My early exposure to critical HRD revealed the existence of various influences that need to be discovered, and finally, the relationship between learning and identity needs to be clarified.

1.5 The research context

The use of contact centres for organisations to communicate with their customers is a relatively new phenomenon. It is particularly new in the public sector, as they started to appear after the turn of this century. They are interesting to study as high intensity workplaces as they are associated in the minds of some with post-Taylorist 'sweat shops' with high labour turnover and poor job satisfaction; the so-called "McJobs . . . [that] require

little training and little skill to perform them" (Ritzer & Stillman, 2001, p.105). The reality can be quite different as some individuals have found them compelling arenas in which to develop their career (Gnaur, 2010). There have been many studies about the operation of contact centres and many more studies about occupational learning generally, but few studies on leaning to become a manager in a contact centre. If I planned to devote considerable years to doctoral research I wanted to understand a growing and significant work area for my own intellectual curiosity and continuous professional development. Secondly, having been exposed to literature about critical management in general and critical HRD in particular, I needed to question my own taken-for-granted ontological and epistemological perspective on learning and its purpose.

There are three principal reasons for selecting this context for research. City-Access, an anonymised name, was one of the first partnerships between the private sector and a local authority in the United Kingdom (UK) and has been used subsequently as a model for other local authorities. Blending two working sectors – one that focuses on profit, the other on civic humanism (Hart et al., 1998) is fascinating, given that they have traditionally been viewed as incommensurable. Given recent changes articulated through the New Public Management (NPM) which note a trend from the commitment to following bureaucratic rules to an ethos where "rewards are based on performance" (Virtanen, 2000, p.340), the nature of manager work has been in flux. Secondly, I acted as client manager for a local university that provided learning services to managers from City-Access. I wanted to discover more about the manager role and how it was learned to review the learning interventions that our team had designed. Our future and my own employability could have been dependent on the research interpretations. Finally, given the business relationship, access to suitable managers would not be problematic.

1.6 Structure of the thesis

Chapter two starts by examining the work of managers generally before considering the specific nature of first-line manager work and the range of activities that are considered to fall within the remit of the role. Given the wide variety of possibilities, it concludes that there can be no one universal prescription for the role and the activities of each manager is specific to a context.

Chapter three is in two parts. It firstly examines the domain of learning and identifies the relevant themes in the literature that are germane to the data. This synthesises four orientations to learning with six metaphors for learning. Many writers assert that learning

involves a change of identity and this is explored in the second half of the chapter. Learning is shown to influence identity, but not in a way that leads to a fundamentally new identity. The chapter concludes with the proposal of a conceptual framework to explore the data. It adopts the term 'learning mode' to describe four approaches to learning; adapt, assimilation, accommodation and aspire, terms that will be explained and justified.

Chapter four introduces the research context of contact centres generally and City-Access in particular. Such work contexts are stereotypically viewed as forms of sweat shops in which technology exerts a dominant control. It also analyses the work that first-line managers undertake in City-Access and both the affordances for learning and the availability of formal learning interventions.

Chapter five presents the research strategy for the thesis and its ontological and epistemological stance. The use of an abductive strategy will be justified on the basis of resolving potential issues of using 'pure' induction. It is not possible for a researcher to ignore pre-existing knowledge of a context, which has been particularly the case in this study. As I have occupational experience as a first-line manager and have trained and educated other individuals about management, including City-Access, abduction permits meaning-making through iterations of analysing of the data with the literature and vice versa.

Chapter six presents interpretations of the data in three themes that relate to the literature and follow three stages in the life course. Learning to be a manager can be traced to early life experiences and the influence of parents and teachers, then pre-manager occupational experiences and observing others performing the role, and finally the reality of the participants in performing a first-line manager role. As a manager the participants were subject to control by their line managers, titled Operations Managers in City-Access and the ubiquitous controls from the available information and communication technology that demanded attention.

Chapter seven explores the implications of themes revealed in the data and revisits the conceptual framework developed in chapter three to show how learning modes change over the life course. These change the emphases in the framework, the lens through which learning can be viewed but not the learning modes. The conceptual framework can therefore be considered robust.

Chapter eight concludes the thesis and revisits the research objectives to confirm that they have been addressed and identifies the contribution to extant theory. This leads to issues to be pursued in future research for my continuing development.

1.7 Contribution to knowledge

The thesis makes the following claims to knowledge:

- Using situated learning theory as a starting point, the current research is uniquely able to discern three stages from legitimate peripheral participation to mastery in the process of becoming a first-line manager. This identifies the context for learning as three stages in the life course.

- Learning to become a first-line manager does not necessarily change identity. Individuals do not abandon former identities, they merely add an additional layer to the existing repertory.

- Teachers make a vital contribution to developing future first-line managers by affirming and strengthening family values and encouraging their pupils to recognise the connection between effort and gaining eventual reward for achievement.

- The messy terrain of learning theory has been clarified, not as grand theory, but as mid-range theorising through a new conceptual framework.

1.8 Chapter summary

This chapter has introduced the nature of this thesis and established its importance in identifying how individuals learn to become a first-line manager. It has specified research objectives and provided an overview of the chapters, before identifying its contribution to the body of knowledge.

The next chapter seeks to clarify the nature of the role of the first-line manager.

CHAPTER 2 BEING A MANAGER - THE JOB AND THE ROLE

2.1 Introduction

The status of a manager is often a goal to which some individuals aspire when starting their working lives; a future position within an occupational sector. Conferring the title of 'manager' on an individual will often be used by employers and recognised by staff as a reward for success in the performance of a non-management role. However, what is understood by the term 'manager' is not clear. Few studies have sought to understand the term, as most writers have focused on 'management' by examining and then proposing a set of activities that are undertaken. This has almost led to a form of competition through which writers attempt to suggest their 'best way' of managing, an exclusive world view offered as a prescription to regulate the behaviour of those performing the role. However, there is no general consensus about the activities the role entails. Views about the nature of the role and its focus have evolved; they are not static, which further questions the 'recipe' approaches that have been advanced. The absence of an immutable view of the role of the manager makes a critical examination of the terrain difficult to penetrate. This is further complicated when management is viewed through a postmodern lens, as the manager's role is studied in less rigid ways and is characterised by change and the breaking down of bureaucracy (Grey, 2009). The nature of the role will be informed by the strategic direction, the type of products or services offered and the stage of organisational lifecycle in specific contexts. These dimensions will be shown to be important in my research context.

Before engaging in a discussion about management, it is important to clarify my use of the term, given that it is common for some writers to conflate management with leadership, and use them interchangeably (Gilstrap, 2009; Middlehurst, 2012). There are, however, nuanced differences between the two (Schroeder, 2010; Kinicki et al., 2013). The etymology of 'leadership' appears to have its roots in the Norse / Anglo-Saxon lexicon suggesting a path or a journey. Leadership implies creating a purpose, providing direction, initiating change together with the need to support and focus people (Kottke et al., 2013). With leadership comes followership, emphasising the two-way nature of the relationship. The origins of the term 'management' can be traced to the Latin *manus* (hand), and concerns control, order and consistency in the use of people, although it has more of an association with administration (Fayol, 1949). Whilst accepting that there is the potential to conduct a full, separate study of this topic, I will not pursue distinctions further, principally to avoid

distraction. Whilst there are examples of studies about first-line leaders (see for example MacPhee & Suryaprakash, 2012), most literatures refer to first-line manager. This is the term I shall use henceforth, which supports the view of Wallo et al., (2012) who suggest that first-line managers perhaps have more in common with supervisors than leaders.

In this chapter, I shall identify characteristics of the manager's role in an attempt to illuminate what an individual needs to comprehend to become a manager. To start, I shall consider the nature of management and then clarify the nature and activities of the role of a manager and will then critically examine the skills needed to be a manager, which will lead into an evaluation of the contribution to the narrative of management competencies. The analysis will illustrate how perceptions of the management role have changed over time. The chapter will conclude with a consideration of the relevance of more contemporary notions of management drawn from the field of critical management studies.

2.2 What is management?

It is prevalent for study texts about managers to start with a consideration of the broader term 'management', although that term itself is elusive as it can connote both groups of managers, collectively labelled 'the management' of an organisation, as well as the technique of managing (Mullins, 2013). However, definitions that include the term that is to be defined remain unsatisfactory. Drucker (1979) sees management as tasks, discipline and people. Watson (1986) considers management as science, as art, as politics and even, provocatively as magic. Ramirez and Mabey (2005) indicate the breadth of the term by stating that in a UK context, it is applied to jobholders from supervisors to executive directors. The study of management is in consequence a very broad, yet contested terrain as 'management' is "a generic term" (Mullins, 2013, p.166) and therefore subject to a multiplicity of interpretations. As views of management have evolved over time, I will structure my inquiry by considering two ontological perspectives, realist and idealist, and present a summary of management characteristics under these headings in table 2.1.

Table 2.1 Perspectives on management

Ontology	*Characteristics of management*	*School of thinking*
Realist	Status	Scientific management
	Power and Control	Scientific management
	Regulation	Scientific management
	Efficiency	Scientific management
	Rationality	Scientific management
	Motivation	Human Relations
Idealist	Individualist	Human Relations
	Change	Systems thinking
	Ambiguity	Systems thinking
	Fragmentation	Systems thinking
	Effectiveness	Systems thinking
	Particularity	Critical management
	Emancipation	Critical management
	Empowerment	Critical management

Developments in management thinking

Most studies of management thinking (see for example Cole & Kelly, 2011), consider that it has developed through three stages, the Classical school, the Human Relations and Systems approaches to view 'the big picture', thinking in wholes. Writers focus on a rational approach to management by examining what is *done* under the title of management. The outcome of these approaches is to submit that the key purpose of management can be reduced to either a lists of tasks, or specific areas that relate to personal motivation.

The title of the Classical School is attributed to Taylor (1911) and his ideas were considered at the time a revolutionary approach to management. His aim was to increase efficiency in working practices by identifying the 'one best way' to perform work tasks. Fayol (1949) developed this work and grouped management activities into six groups - technical, such as production and manufacturing; commercial, buying and selling; financial, using capital in the business; security and safeguarding; accounting for control purposes; and managerial, translated from the French for administration. He further subdivided managerial into five elements that have been well-used in manager education and have come to define management (McLean, 2011): planning (or foreseeing), organising, command, co-ordination, and control. In his contribution to the Classical School, Weber (1947) introduced the word bureaucracy into the discourse, a term that is associated with regulation and control and use of power through articulated rules and regulations. Management of an organisation in his

view is achieved through the use of authority vested in persons holding the position to direct work. Power, authority and influence are associated concepts that play an important part in Weber's thinking.

The Classical School is therefore characterised by prescriptions for management that restrict opportunities for individuals to demonstrate creativity in the performance of their role. They develop their understanding of what is required for management through the structures imposed upon them. An alternative view is that having a prescription of what to do gives comfort to individuals who have a clear understanding of the expectations of their role without having to make choices for themselves.

In the Human Relations School, consideration for and the motivation of individuals are both considered key elements to the successful achievement of work. Brech (1975) built on the work of Fayol and proposed four elements to management - planning, control, co-ordination and added motivation, linked to inspiring morale in support staff. Drucker (1979) also sustained the principles of the Classical School by proposing management by objectives and extended his ideas to include three people-centred issues - motivating and communicating to a team of workers; measuring and focusing on individual, group and organisation targets; and developing people. The often-cited exemplar study in this stage of management development is the Hawthorne Studies (Crainer, 1998) which demonstrated the importance of paying attention to people, by either deliberately improving working conditions and talking to staff, or making conditions worse. Whilst this later point is counter-intuitive, the studies concluded that any form of interaction with people is preferable to no attention at all.

The development of the so-called neo-human relations school groups relates to oft-cited if not entirely clearly understood motivation theorists, such as Maslow (1943), Herzberg et al., (1959), and McGregor (1987). They sought to understand not only the specific elements that motivate an individual at work, but also elements in the working environment that can lead to demotivation. In the Human Relations School, writers concluded that workers respond more effectively when they engage in social contact rather than being treated impersonally as a machine, as they are respected and valued.

The Systems Approach to management is an attempt to make sense of both the first two developments by looking at how the structures and constraints suggested in the first two developments affect an individual's approach to work. Bertalanffy (1951) suggested that a 'general system theory' would encourage an individual to think more broadly about an organisation as a series of connected systems and subsystems and his place within it. In

consequence, individual input to an enterprise can be seen through recognising the different contributions of specialisms.

Throughout these developments, power is exerted over workers, who are "caught within a complex grid of disciplinary, normalizing and panoptic powers that survey, judge, measure and correct their every move" (Best & Kellner, 1991, p.55). This supports one of Morgan's (1997) views of an organisation as a 'psychic prison', which can foster contumacious behaviour in the disaffected. Workers are told what to do and how to do it, a recognition that "every human relation is to some degree a power relation" (Foucault, 1988, p.123). In occupational situations, the length of work experience can lead to "more knowledge, more power" (Balsamo, 1998, p.230) and this can be used to subjugate a newcomer. This is not limited to work contexts. For instance, there are many examples of societal power imbalances, such as perceived differences in social standing. This may compel people to 'keep up with the Joneses' whereby individuals feel pressure to "maintain equal status with their economic peers" (Burleigh & Meegan, 2013, p.6).

It is also interesting to reflect that as the study of management has developed, there is an increasing focus on relating management activities to the contribution of people and respecting their role and contribution. This reflects progress in organisations towards considering people as talent, a recognition that human capital is a major contributor to competitive advantage (CIPD, 2013).

Contemporary views of management

More recently, studies of management have been concerned with "the search for instabilities" (Lyotard, 1984, p.53) and "de-differentiation" (Lash, 1990, p.56) as "all meanings are context specific" (Vera, Crossan, & Apaydin, 2009, p.156). This is characterised by a fragmentation of perspectives and ambiguity of meanings (Griffiths, 1995). As this gives rise to "a diverse set of positions" (Hassard, 1993, p.7), postmodernism itself defies a clear definition and is considered as "modes of representation" (Malpas, 2005, p.13) that recognise and rejoice in difference. The postmodern era is characterised by a lack of grand narrative in which knowledge is considered as *petit récits* (Lyotard, 1984), smaller dialogues. These more modest claims to management knowledge turn the focus away from positivism and towards constructionism, and from rationality to a more chaotic position in which individuals operate within less rigid structures; the world "is kaleidoscopic and unstable (Esade & McKelvey, 2010, p.419). This permits a discourse of different stories about organisational life, with diverse accounts of reality. Kreiner (1992, p.43) summarises this succinctly by suggesting

that in engaging in organisational life “we only take part in the masquerade”; each individual is free to choose his view of an organisation and how he is viewed within it. In that sense, postmodernism is about the language that individuals choose to use in their discourse about management and organisations and introduces the possibility of multiple views and a fragmented representation of reality.

Clegg (1990) does, however suggest that it may be helpful in the postmodern narrative to have some semblance of structure to clarify understanding. He proposes that postmodernism can be analysed in four distinct areas. Firstly, technological determinism suggests that the available information and communication technology (ICT) infrastructure in an organisation can restrict the potential for work to be automated and routinised. The more sophisticated and extensive it is, for example using 4G technologies, the greater the scope for staff to work remotely, and for customers to assume part of the work traditionally done by employees (Frattassi, et al., 2006). This is a surprising suggestion given that ICT can be used for surveillance of staff. Secondly, structural flexibility in an organisation reduces traditional, rigid bureaucracies and introduces the possibility for staff to have different reporting relationships with managers. Such flexibility is found in matrix management, where an individual may report to one manager for one set of activities and another for the balance of his work. Clegg (1990) thirdly considers the ways in which the design of jobs might encompass multiskilling. This would permit individuals to use the full extent of their skills and knowledge to perform relevant tasks without being constrained by the controls and limitations expressed in performance agreements or job descriptions. As a form of empowerment, this can encourage self-motivation by introducing uniqueness to a job (Raemdonck et al., 2012). It may also liberate workers by giving them greater choice about their employment, which shifts the power balance in the employment relationship. Finally, and building on the previous point, Clegg (1990) maintains that organisations need to develop complex employment relations processes to reflect individual and specific agendas

Postmodernism can therefore be viewed as radical subjectivity (Foucault, 1995), yet there remains attributes of power within organisations which are outside the control of individuals and “exercised in the way the very language and gestures of workers have been shaped by the organisational authorities (supervisors, managers) who watch over them and measure them” (Fineman, 2011, p.562). It is interesting to note that in Foucault’s original French title (1975), *Surveiller et punir*, surveiller is translated as discipline. The Collins French dictionary (http://www.collinsdictionary.com/dictionary/french-english, accessed 23 July 2013) translates the word as to watch or to supervise. Perhaps Foucault’s close association with notions of the panopticon have influenced the translators, as such a nuanced difference

appears not to have been noted by later writers. Although the notion of the panopticon is associated with prisons, as noted by Morgan (1997) above, Burrell (1988) considers that the extension of the analogy to organisations is relevant, as the organisation of work imposes a great degree of control over the lives of individuals. He reinforces this further suggesting that "it may well be that computer networks resemble in several ways the architectural design of the panopticon" (Burrell, 1988, p.233). Giddens (1984, p.184) in contrast disagrees because prison as "total institutions stand outside others because of the daily life paths of those inside". I will follow the views of Burrell in this case for two reasons. Firstly due to the propensity of computer networks to act as a form of 'tachograph' that can track every key stroke of the operator. Secondly, because the extent to which an individual can completely forget about events that have occurred in the work day or can avoid anticipating what is to come is unclear.

Best and Kellner (1991) draw on the work of Baudrillard to suggest that power exists in the postmodern era through the use of electronic media and information technologies. This will become important in chapter four when I consider the research context. Postmodern views of management challenge 'the truths' and reject formulæ and prescriptions to permit an individualistic approach to work. This is hardly satisfactory from an employer's standpoint as it completely reverses the earlier approaches to the employment relationship. It is inconceivable that a labour market in developed economies would pay an individual to do whatever he chose. Foss and Mahnke, (2011, p.135) are more specific and state that "a firm will not pay for an employee's learning of general knowledge, because of the weakness of its bargaining position after having made the investment". A question then arises, to what extent are these contradictory positions found in contemporary organisations? Before considering this question, a fourth movement in management thinking needs to be explored.

Critical views of management

A dominant theme in this chapter so far is the control that successive attempts to rationalise management have imposed on the work of managers. Views of managers as controllers have existed since the time of Adam Smith (1776), although studies about power in organisations increased in the UK in the 1990s through the lens of critical management studies (CMS) and in particular through the work of Alvesson and Willmott (1992). CMS originated from critical theory, a movement that seeks to encourage reflection and radical examination of contemporary issues in society (Geuss, 1981) and challenge taken for granted assumptions. The initial focus for CMS was a response to the discourse surrounding the growing influence of management power that followed anti-union legislation (Fournier &

Grey, 2000). This encourages managers to exercise power over workers who are used instrumentally, simply to achieve performance outputs. First-line managers, as workers themselves, are subject to management power but may have some ability to displace this to their staff. Put simply, if rather inelegantly by one of my research participants, this can be summarised as *"shit rolls downhill"* (Jamie); if a first-line manager is treated harshly by his seniors, he will mete out similar treatment to his direct reports.

CMS has associations with postmodernism yet its key difference is identified by Johnson and Dubberley (2000) who suggest "that it maintains hope that knowledge can lead to emancipation and progress" (p.115) and "frees people from overt and covert forms of domination" (p.120). This is idealistic given the lived-world of current organisational practices, especially at the time of writing when the public sector in the UK continues to operate under conditions of austerity. Criticism and reflection are useful conceptual tools, but when one version of reality is imposed on managers, there is the potential for conflict. The reality and limitation of CMS is posited by Parker (2002, p.132) with a sobering codicil:

> When the B-schools become empty, when the corridors contain dead leaves and the roofs leak, then they will be converted to sociology departments or housing for the elderly, and CMS will have done its job [but] if the limit of your ambitions is to put yourself out of a job, the prospects . . . do not seem to be bright.

Managers may voice their concern over how they are controlled, but are powerless to demand changes to their condition.

Current organisation practice

The literature discussed thus far shows that the early approaches to management exert power and control over workers through the use of defined lists of activities that have to be undertaken, together with identified areas that target individual commitment to work. Claims that "we live in postmodern times" (Pennycook, 2005, p.61) imply that workers have freedom, agency over their actions, yet this is not always the case. Organisations continue to exert domination over workers by specifying what activities are done, through the use of job descriptions, and how it is done through the use of person specifications and competency statements. An organisational exception to this, amongst a growing number of workers' cooperatives, is the Brazilian company Semco (Semler, 1993) where workers are empowered to take action without first seeking permission. Managers set their own salaries and bonuses as long as they do not compromise profit (all staff have access to finance

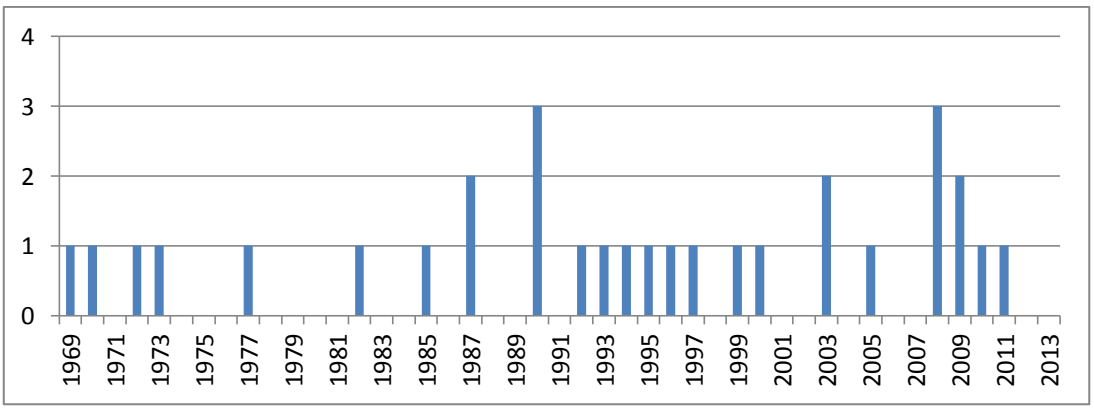
information), and keep the usual affordances of organisations, such as meetings, memos and approvals to a minimum. Such approaches remain outside the public sector.

According to Foucault (1982), power exists in organisations through reporting lines within bureaucratic structures with the level of power being relative to an individual's position in the pyramidal hierarchy. This is reinforced through a range of instruments; periodic monthly one-to-one review meetings, senior management coaching, and performance reviews and competency ratings that document and record a worker's attributes. It appears that management freedom remains illusory and aspirational. Foucault's position does not, however, recognise the different forms of power that can be exhibited in organisations (French & Raven, 1959). His view accords with ideas of positional or legitimate power, yet it may be trumped by "social power" (Jayasingam et al., 2010, p.135) or "personal power (Lammers et al., 2009, p.1545). For example, a senior manager who lacks confidence may feel powerless to control the activities of a confident and ambitious first-line manager despite his legitimate power.

2.3 What is a manager?

As the focus of my enquiry is first-line managers, this rather elementary question needs to be addressed before considering a specific group of managers. Surprisingly, it has not had a thorough exploration in the literature. A systematic search of academic sources conducted in June 2013 using the title of this chapter section as the search term in Google Scholar only produced around 30 'hits' with any relevance. There were many website 'hits' that changed the sense of the question by extending it to "what is a manager *to do* . . . ", but specific questioning of the role was limited and distributed over a number of years. This is shown in table 2.2 below.

Table 2.2 Number of journal articles matching "What is a manager?" 1969-2013



In the majority of cases, the article explored activities in which a manager engaged. There are two exceptions that consider the question from an identity perspective. Bryans and Mavin (2003) pursue the question from a female standpoint. Disappointingly, they do not make comparisons with males. On the one hand they are critical of the notion that "management is a male construction" (p.117), yet conclude by proposing that women need to determine a feminist version. Is this an attempt to replace one hegemonic position with another, which exposes them to the same criticism they level at the male discourse? The contribution of this work is fundamentally devalued however, as the writers do not maintain consistency in their ontological stance as they switch to a postmodern position by agreeing with Watson and Harris (1999) that management is not fixed and is a process of becoming. As such, this conflicts with their suggestion of a unitary view of feminist management.

In the second exception, Watson and Harris (1999; and Watson, 2001b) consider the transition to a manager as a continuous process of emerging and of becoming, very much a postmodern stance. Learning to become a manager is learning about 'life skills' and developing as a person rather than trying absorb knowledge *about* management. There are many definitions of 'life skills' most based on national cultural norms, but Danish et al., (1993) suggest that life skills support individuals to negotiate life situations with success. They suggest that the skills include communicating and behaving appropriately with others, and making effective decisions that recognise possible consequences for others. Gould and Carson (2008, p.353) defined life skills as "those personal assets, characteristics and skills such as goal setting, emotional control, self-esteem and hard work". Their research subjects reflected that they learned to be a manager almost without noticing it as they distinguished the actions of a manager from carrying the label - "being a MANAGER, you know, in big letters" (Watson & Harris, 1999, p.1). They maintain that "the identity of 'manager' is complex and negotiable, there are continual decisions and choices about how to present oneself and how to manage oneself" (Watson & Harris, p.117). Being a manager also has an effect on their non-managerial lives in terms of relationships with others and how they are perceived.

Perhaps a reason why there have been few attempts to define a manager in the academic literature is that despite the abundance of literature on management, the role is interpreted differently in differing contexts. Radić et al., (2013, p.550) proposes that "a manager is the person responsible for planning and directing the work of a group of individuals, monitoring their work, and taking corrective action when necessary", a very performance-centred definition. Viewing literature through a postmodern lens would connote grand theory being

interpreted uniquely in each situation with theory being produced in the course of application, so-called mid-range theorising (Gibbons et al., 1994). This could lead on to my assertion of a definition for this thesis, at a straightforward level, that a manager is an individual who practises management, an idea that has support from Grey (2009, p.62) who comments "management is what managers do". However, when viewed through a postmodern lens, I define a manager as an individual who self-describes as a manager.

Attraction of the role

Individuals will have different motivations in wishing to become a manager. Muldoon and Miller (2004) explored this theme and discovered numerous possible attractions which included career advancement, the opportunity to earn more money, a sense of personal achievement, recognition by peers, accident, vocation, the ability to exercise more power, variety in tasks and job, and to develop relationships. As mentioned in the introduction to this chapter, the role of a manager can confer personal status, although certainly in a UK context, this will attract contrasting values in different contexts. Hill (1992, p.16) suggests that the transition is often associated with a change to work that involves "a major leap in scope, more people, more dollars, functions, products and markets to be managed". Promotion into a manager position has for a long time been seen as a reward for individual performance at a lower organisational level (Goldner & Ritti, 1967). This is in spite of a recognition that successful performance of tasks at one organisational level does not guarantee success at a higher level (Taylor, 2014). Routes into management have been examined by Rees and Porter (2005) who concluded that most managers principally come from a technical / specialist background. This is unsurprising in a UK context, given the limitation of pay and reward structures: to retain valuable staff, employers may promote people without considering whether they have relevant knowledge, skills and experience. This demonstrates the Peter Principle when individuals are promoted to a level beyond their capabilities (Peter & Hull, 1969).

Progression into management is not, however without its difficulties. There are many issues confronting the new manager shown in figure 2.1 which can bewilder and lead to role stress. This arises as individuals try to satisfy competing expectations about the role (Hill, 1992); try to cope by being "thrown in at the deep end" (Watson & Harris, 1999, p.42) and even to consider the possibility of failure in the role (Gabarro, 2007). There is the potential for great confusion in adapting to a new role and becoming a manager, which may not be helped by imprecise or poorly written person specifications and / or outcomes based job-descriptions.

Promotion has also been used by organisations as a longstanding approach to planning for future labour requirements (Drucker, 1985), as filling a manager vacancy requires either recruitment from the external labour market or the development of staff to assume future responsibilities. Thus far, the attraction of the role has assumed that it is seen as

Figure 2.1 Influences on a manager (Mumford, 1993, p.17)

valuable to an individual. However, in post-modern times, some managers suggest that the term 'manager' can come to have a pejorative meaning due to the ennui that arises from overuse of the term, and relatively low-level positions attracting the label (Grey, 2009). If the label is hackneyed, it reduces its value and therefore its allure. In professional contexts, such as health care it can lead to disputes along professional and managerial lines (Dent, 2003).

2.4 Positioning first-line managers

The discussion about managers thus far has not considered the different strata at which managers operate. Organisations use terms such as senior manager, middle manager and junior or first-line managers (Farrell & Morris, 2013) in a scalar chain. These layers are often associated with defined areas of responsibility. For example, senior managers will propose and evaluate strategic issues, middle managers will organise tactical level issues and first-line managers attend to the operational in supervising workers who in turn attend to customers or service users. The literature reviewed thus far has focused on management in general without considering potential subtleties in how the role is performed at different

levels. Whilst the management literature focuses on the grand narrative, it tends to have originated from studies into senior management. Studies on the other two layers of management have tended to be located in specific contexts, as indeed is this current study. Other levels of focus tend to be context specific. The studies of 'managing in the middle' have considered schools (Busher & Harris, 1999), colleges (Briggs, 2003) and more recently libraries (Farrell & Schlesinger, 2013). Studies of first-line managers cover a range of contexts, although the field of nursing has been of growing interest.

More widely, the UK government also has an interest in managers through the quango Management Standards Centre (MSC) as "Management and Leadership skills are crucial to the prosperity of the UK economy" (http://www.management-standards.org/ accessed 21 July 2013). The MSC classify managers into four levels, starting with supervisor, to first-line manager, middle manager and senior manager, although confusingly do not clearly specify how the four positions relate to its qualification structure that starts at NQF 2 through to NQF five (level five relates to second year undergraduate). I would expect the role and work of senior managers to be recognised at level seven, or even eight.

It is in the professional world where specific detail about the scope of tasks undertaken to recognise the management level is more commonly found. For example, the Chartered Management Institute (CMI) and Chartered Institute of Personnel and Development (CIPD) link their qualification structures that lead to management to the UK's National Qualification Framework. This scales the list of activities that are undertaken for the different levels. For example, an extract from CIPD's profession map (CIPD, 2012a) is shown in table 2.3 that shows the route a professional can take to become a manager at band 3. I have added to this to locate the levels of manager already discussed.

Table 2.3 CIPD profession map

	Band 1	*Band 2*	*Band 3*	*Band 4*
Relationship with client	Delivering fundamentals	Adviser issues-led	Consultant, co-operative partner.	Leadership colleague, client confidante and coach
Focus of activity	Client support and processing activity. Immediate and ongoing.	Advising and managing individual or team-based human resource issues and problems.	Leading the professional area. Addressing the HR challenges at the organisational level. Medium and longer	Leading the function or professional area. Leading the organisation. Developing the organisational

		Current or near term.	term.	strategy. Developing the HR strategy. Partnering with the client.
Manager level	Not a manager	Supervisor/First-line manager		
			First-line manager	
				Middle manager
				Senior manager

First-line managers are of particular interest to organisational researchers because they act as a pivotal link between an organisation's senior management and its operational staff. Their role has been subject to continuing professional body interest (CIPD 2007; Worrall & Cooper, 2006; MacLeod, 2008; Antonacopoulou et al., 2010) and numerous practitioner texts that attempt to define practice in a prescriptive way (see for example Templar, 2005; Watson, 2007). These writings, together with curricula from manager programmes run at university business schools, suggest that the first-line manager role exists to translate strategy and policy into practice, respond to change, and to lead and direct support staff. Corporate people management policies and strategies are increasingly devolved to line managers (CIPD, 2009b) although it should be recognised there can be inconsistencies in how such duties are discharged (Watson & Harris, 1999; Purcell & Hutchinson, 2007). First-line managers have the potential to be the weak link between worthy human resource management policy and a poor reality. Some studies have queried the nature of the manager role and whether it can be analysed in a way that leads to generalised prescriptions (Mintzberg, 1973; Stewart, 1999; Watson, 1994). Others have dared to suggest that managers and management are "significant in the struggle for corporate and indeed national success" (Storey et al., 1997). However, as the role in a specific context is clearly defined through organisational instruments of job descriptions and person specifications, mentioned in section 2.2, human resource development professionals and business schools in particular have developed curricula to provide individuals with the opportunity to learn how to become a manager (Mumford, 1993).

2.5 What a first-line manager does – tasks and activities

There is considerable confusion in the literature and amongst practising managers about what first-line managers do. Hales (1986) conducted a review of considerable empirical work to answer the question, "What does a manager do?" He suggests (Hales, 1986, p.95) that in

manager work which is within fluid boundaries, the following strands are common, if not universal:

(1) Acting as figurehead and leader of an organizational unit

(2) Liaison: the formation and maintenance of contacts

(3) Monitoring, filtering and disseminating information

(4) Allocating resources

(5) Handling disturbances and maintaining work flows

(6) Negotiating

(7) Innovating

(8) Planning

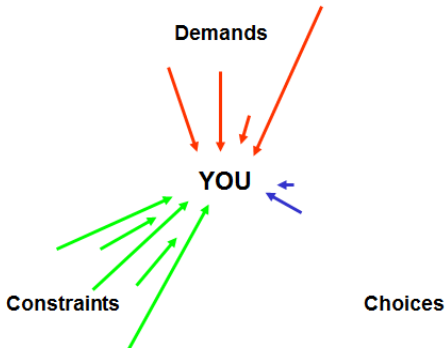
(9) Controlling and directing subordinates.

Handy (1993, p.361) reports that most individuals performing a manager role claim that they take decisions, but when they analysed their practice, he concluded that this is "another managerial stereotype". A consistent theme in a range of literature (Mintzberg, 1973; Hill, 1992: Drucker, 1979; Watson, 2008) posits that manager work is characterised by brevity, a focus on short tasks (Mintzberg's ten minute itch); fragmentation due to interruptions from senior managers, colleagues and support staff; and variety in the scope of issues requiring attention. This is significantly different to the notion of prescriptions for identified tasks, although it must be recognised that Mintzberg only worked with a small sample of senior managers.

Although Stewart (1982) does not expressly state that her participants were first-line managers, her ideas are relevant as she explores the work of managers who oversee the work of others. She proposes that the manager's role is a dynamic mix of demands, such as minimum criteria for performance; constraints, which include resource limitations; and choices over what is done and how. First-line managers need to negotiate how they accommodate each of these three areas to recognise their potential to use personal agency and to wrest a measure of control over their actions. This would be consistent with a CMS agenda to emancipate themselves from organisational domination. Drawing on a personal example, when I have introduced Stewart's ideas into a number of facilitated manager development sessions, I have asked managers to express each of these three elements in their own work as a star diagram. The number of lines represents how many factors there are, and the length of the line indicates the severity or importance of the factor and typical

results are shown in figure 2.2. On completion of the exercise, the reaction of most first-line managers is one of disillusionment in their new-found status of manager. They recognise that they have many demands and constraints, yet few choices over what and how they do their job. Their job tightly controls their actions. Interestingly, most comment that they had more choice and discretion in their previous non-management role. Management in a range

Figure 2.2 A typical first-line manager 'Star' diagram



of contexts can appear to be a process of following policy guidelines and responding to emergent situations using a policy or rule book. This gives both a limited scope for personal expression as well as restricting the opportunity to use latent abilities and illustrates perhaps why CMS discourse is needed. Does this connote in a metonymical sense a first-line manager as a pawn, who is trapped between senior manager directives and worker disquiet? Are they neither part of the management nor a worker?

2.6 How a first-line manager does – management competencies

As has been identified thus far in chapter two, there is a disconnect between what literature proposes as manager knowledge and actions, and the lived reality of managers. This extends into the skills discourse, which in the context of manager work has become known as the 'Management Competency Movement (Rogers & Hildebrandt, 1993). Origins of this movement can be traced to the American Management Association during the 1970s and the McBer studies. The idea appeared a decade later in the UK through the Management Charter Initiative (Woodall & Winstanley, 1998).

The movement is hampered by etymological confusion through differing use of the terms competence(s), competency and competencies (Sparrow & Bognanno, 1994). Iles (1993, p.67) provides further support for the confusion as the term can refer to "an action,

sometimes to an underlying *ability* to act, and sometimes to the *outcome* or *results* of actions" (emphasis in the original). Sparrow and Bognanno, (1994) suggest that competence infers an individual's ability and when used in the plural describes knowledge, skills and attitudes that are required to achieve job tasks successfully. Competences are associated with occupational, vocational and professional standards and what a manager is required to do (Hoffman, 1999). Competencies, in contrast, are "behavioural repertoires" (Sparrow & Bognanno, 1994, p.59), the set of characteristics that an individual brings to a job role and describes his skills set. For the purpose of this thesis, I shall use the term competencies to refer to *how* a manager enacts his role using skills and behaviours. As will be explored in chapter three, the behaviours used by managers and perceived by others form views about identity.

A key text in the management competency movement is by Boyatzis (1982, p.20) who defines competencies as "an underlying characteristic of a person which results in effective and /or superior job performance". Although originally designed for senior managers, competencies are widely applied to all levels of manager. He proposes that the performance of effective and/or superior managers can be considered in two subdivisions, threshold and performance competencies. The group of threshold competencies are those required for any job and the degree of successful use of the performance competencies distinguishes the superior performer. These competencies are shown in table 2.4. Boyatzis' approach maintains the forms of prescription about manager work (tasks) already explored. I agree with Woodruffe's criticism (1993, p.34) of Boyatzis' subdivisions as "a good proportion of competencies for a job are both threshold and performance." For example, a manager without the ability to self- assess accurately can be a major disruption when supervising a team or working in a group with co-workers, by failing to recognise the effects of his behaviour on others.

Table 2.4 Boyatzis (1982) management competencies

Threshold competencies	***Performance competencies***
Use of unilateral power	*Goals and action cluster*
Accurate self-assessment	concern with impact
Positive regard	diagnostic use of concepts
Spontaneity	efficiency through orientation
Logical thought	proactivity
Specialised knowledge	*Leadership cluster*
Developing others	conceptualisation
	self-confidence
	oral presentations

	HRM cluster
	use of socialised power
	managing group process
	Directing others cluster
	Use of the threshold competences
	unilateral power / spontaneity /
	developing others)
	Others cluster
	perceptual objectivity
	self-control
	stamina and adaptability

Following the publication of Boyatzis' work, and especially during the 1990s, a number of writers contributed to the management competency movement. These contributions added further to the list of qualities required of a manager with little thought as the relevance of the attribute for the level at which the manager operates or the specific context. Virtanen (2000, p.335) helpfully summarises these works, which I have included as figure 2.3. They illustrate the 'competition' agenda I submitted in the introduction to this chapter as writers seek to privilege their work over others. Missing from this list is the work of Pedler et al., (2013) who

Figure 2.3 Managerial competences identified by previous research

1. Conceptualisation	23. Interpersonal skills	37. – focus on results
2. Managing group process	24. Understand whole organisation as a system	38. – influence decision at lower levels
3. Concern with impact	25. Vision setter – concentrate on basic purpose and direction	39. Make trade decision and allocate resources
4. Diagnostic use of concepts	26. – communicate where organisation will be in 20 years	40. Building contextual competences
5. Efficiency orientation	27. – create values and trust to achieve vision	41. Leadership
6. Proactivity	28. – study emerging trends (monitor, read environment)	42. Human resource management
7. Self-confidence	29. Transfer intellectual output to service	43. Promote creativity, learning and innovation
8. Perceptual objectivity	30. Motivator – challenge people with new goals	44. Skills of remote management
9. Stamina and adaptability	31. – emphasise organisation's values	45. Use of information technology as a transformative force
10. Building and maintaining a power base	32. – create sense of excitement	46. Managing complexity
11. Presenting ideas	33. Analyser – evaluate proposed projects	47. Communication
12. Figurehead	34. – integrate conflicting perspectives	48. Decision making
13. Leader – formal authority	35. – question staff	49. Financial management
14. Liaison with external and internal contacts	36. Task master – contribute knowledge on problems	50. Management skills
15. Monitor		51. Technical background/ experience
16. Disseminator of information		52. Credibility
17. Spokesperson externally		53. Autonomy
18. Entrepreneurial		54. Openness/trust
19. Disturbance handler		55. Empathy and understanding
20. Resource allocator		
21. Negotiator – conflict resolver		
22. Use analytical techniques		

Sources: Boyatzis (1982: items 1-11), Mintzberg (1975: items 12-21, 28), Katz (1974: items 22-24), Quinn (1992: items 6, 25, 27, 29), Hart and Quinn (1992: items 25-26, 28, 30-39), Morgan (1988: items 6, 25, 28, 40-46), case studies: items 41-42, 47-55. – Adapted from Vilkinas *et al.* (1994, pp. 25-6)

concluded from a study of successful and less successful managers, that 11 qualities are needed for success in the role. This work is important as the writers introduced elements that would appear in the discourse on emotional intelligence which will be explored later in this section. These attributes are grouped into three clusters and shown in table 2.5. They can be seen as a move towards postmodernism by the inclusion of elements such as learning habits, self-knowledge that can support personal emancipation.

Table 2.5 Qualities of a successful manager

Cluster	***Attribute***
Basic knowledge and information	Command of basic facts
	Relevant professional understanding
	Continuing sensitivity to events
Skills and attributes	Analytical, problem solving skills
	Social skills and abilities
	Emotional resilience
	Proactivity
Meta-qualities	Creativity
	Mental agility
	Balanced learning habits and skills
	Self-knowledge

There are a number of critics of competencies' approaches. They offer too rigid a framework and are slow to respond to change (Spry & Duignan, 2003); they treat people as "manageable commodities (Burgoyne, 1993, p.10); they have a "tendency to adopt a *positivistic* approach" (emphasis in the original, Holmes & Joyce, 1993, p.39) and follow the 'rational manager' discourse (Garvey, 2011). This point is particularly important as Bolden Gosling (2006, p.155) draw on the work of Sandberg (2000) to suggest that "work competencies . . . arise, not out of acquiring a predefined set of capabilities but as a result of the worker's conception of the ultimate purpose of his/her work". This gives some hope for the potential exercise of agency as resistance to imposed controls.

Further criticisms indicate that competencies have the potential to discriminate against ethnic minority groups (Tucker, 1981); they are difficult to define accurately (Brown, 1993); they lead to a form of cloning (Dunleavy & Hood, 1993); and are too focused on "control of worker performance" (Hoffman, 1999, p.278). In addition, they tend to focus on past performance rather than being able to predict future performance (Cullen, 1992; Lester, 1994). This is an extensive list of reservations, yet organisations continue to use competencies.

There is in addition, another issue to consider. Skills development is often viewed as subordinate to knowledge development. For example, completing a Master's degree, is recognised by the pomp of a graduation ceremony, with higher levels of qualification being recognised by increasing extravagance in academic dress. In contrast, the completion of an NVQ level 7 in a UK context, which is arguably more difficult, as a candidate has to evidence the implementation of recommendations in an occupational context, is rarely recognised with such ritual.

In sum, manager competencies are a construct that seek to limit and control work behaviours to those specified in prescribed lists such as job descriptions and person specifications.

Emotional intelligence

A more focused approach to competencies emerges with the introduction of emotional intelligence can be traced to notions of 'social intelligence' in the 1920s from Thorndike, who studied it as a single construct, although it has since been explored in greater complexity (Boyatzis et al., 2000). Salovey and Mayer (1990) first used the expression 'emotional intelligence' to describe four domains of knowing and handling one's own emotions and those of others. The concept was popularised by Goleman (1995) whose intention was to propose 25 competencies in five clusters to predict future performance in a job, shown in table 2.6. Steinberg (1996) maintained this performance ethos by suggesting that the field could also be referred to as practical or successful intelligence, positioning the practice of emotional intelligence in occupational settings. This continues the performativity link identified in functional and behavioural competencies. Although the application of this work is not restricted to first-line managers, it deals with relationships in occupational settings and is therefore relevant to this thesis. However, as will be seen in chapter six, the importance of intra- and interpersonal awareness as a first-line manager is a valuable area to explore as an important element of their work involves interacting with others. Further, it deals with more complex human attributes that can reflect an individual's core values and upbringing, issues that are learned but may not be capable of being taught. This important issue will be explored in chapter three.

Table 2.6 Dimensions of EI

Cluster	***Element***
Self-awareness	Emotional awareness
	Accurate self-assessment
	Self-confidence
Self-regulation	Self-control
	Trustworthiness
	Conscientiousness
	Adaptability
	Innovation
Motivation	Achievement drive
	Commitment
	Initiative
	Optimism
Empathy	Understanding others
	Service orientation
	Leveraging diversity
	Political awareness
Social skills	Influence
	Communication
	Conflict management
	Leadership
	Change catalyst
	Building bonds
	Collaboration and cooperation
	Team capabilities

The criticisms of manager competencies are sustained when considering emotional intelligence, particularly the notion that if managers follow 'recipe X' their successful performance will be guaranteed. I suggest that the production of a list of behavioural requirements for a job imposes tight regulation and control on what and how a manager does. Such lists are constructed by senior managers or human resource professionals acting as their proxy. This limits a manager's ability to explore and apply the potential of his repertoire, his latent abilities. In turn, this may limit the performance outcomes of an organisation by not exploiting the full range of available (human) resources capability / creativity available.

Emotional intelligence has been dismissed as 'soft skills' (Mersino, 2007) in a deprecatory way. Perhaps this reflects the already discussed perceived inferiority of skills against knowledge; or that measurement of the elements requires the use of expensive psychometric instruments; or the general hype through "expert opinion, anecdote, case studies, and unpublished proprietary surveys" (Zeidner et al., 2004, p.371). Yet use of concept continues, as it has been shown to have relevance in identifying successful job performers (Dulewicz & Higgs, 2000) and also for employee well-being (Higgs & Dulewicz, 2014).

2.8 Chapter summary

In this chapter, the range of manager activities and competencies has been presented which add confusion to a clear understanding of the role. There is no unitary view of the activities that managers undertake, or the personal attributes that are required to perform it. These attributes need to be explored in a specific context and this will be done in chapter four. What is clear, however is that studies of management point convincingly to the exercise of control over workers to direct their actions to achieve performance. Managers enact this control despite being controlled themselves, as they become an essential element as instruments of organisational control. The chapter has clarified general understanding of the first research objective in preparation for a more detailed exploration in chapter four.

Given the absence of a fixed and agreed view of the manager role, there are significant challenges in developing an understanding of how an individual learns the role to become a manager. This is the intention of the next chapter.

CHAPTER 3 LEARNING TO BECOME A FIRST-LINE MANAGER

3.1 Introduction

In the previous chapter, I explored the activities that are associated with first-line manager work. That chapter concluded that there is no universal blueprint to denote the work undertaken by first-line managers, as specific contexts will dictate and control the nature of such work and impose control. Each context will, as a result need to be analysed *sui generis*. If the nature of work reflects a given setting, then it follows that how an individual learns the role and becomes a first-line manager will similarly require an individual exploration. This may, however, reflect some commonalities and patterns as well as distinct practice between different settings.

It is rare for an individual to start their working life as a manager. When considering career options after full time education, it is unsurprising that young people rarely talk about becoming a manager as they focus on a specific, visible occupation, such as doctor, fire-fighter, or teacher. The status of a manager, referred to in the introduction to chapter two, is often a goal to which an individual might aspire after starting work. Promotion to a manager position will often be used by employers and seen by individuals as a reward for success in the performance of a non-manager role (Taylor, 2014). Even graduates who are offered manager development schemes, a form of apprenticeship, will often start their working lives 'on the shop floor' before assuming managerial duties. An example from Tesco in the retail sector illustrates this point: "First off, a familiarisation programme will give you insight into aspects of the business. Then you'll move on to understanding what's expected of a Line Manager" (http://www.tesco-graduates.com/ home/ programmes/ store tesco.com). Familiarisation may include receiving goods into the store and shelf replenishment, before moving on to customer contact at check-outs and service desks. Demand for manager development programmes is high. The Association of Graduate Recruiters (Winter 2013) reports that the average number of applications per vacancy is 85.3 (up from 73.2 in 2012), but this increases to over 150 in retail. Some of these programmes may be accredited to professional bodies such as the Institute for Leadership and Management (see for example http://www.enterprise.plc.uk/graduates/), and this accreditation adds weight to an elevated status that can be associated with a manager role.

However, the process of learning the role of and becoming a first-line manager does not start on appointment to the role; nor indeed does it start with a pre-manager development programme. Its genesis, as will be shown in this study, can be traced to events experienced throughout the life course and which continue throughout the working life. Evans and Kersh (2006, p.2) support this view by suggesting that "there is a longitudinal dimension and biographical rootedness in all aspects of skill and knowledge". Learning is arguably never fully completed as there is always more to learn as novel experiences are encountered. In addition to the content of a learning curriculum, "the practice [of learning] itself is bound to undergo modifications" (Kieran et al., 2003, p.6).

This chapter develops two key themes that are suggested by interpretations from the data, consistent with the abductive research strategy adopted that will be justified in chapter five. I will critically review literature about learning and about identity, as the two will be shown to be inextricably intertwined. Firstly, I will clarify the notion that "human learning is messy" (Hermanson, 2009, p.13). This will include both an exploration of the various definitions for learning and an examination of learning as a noun or a verb. I shall then explore four main orientations to learning and a consideration of the ways in which attempts have been made to understand learning through the use of metaphors. Secondly, I shall explore notions of identity and review competing ideas of whether identity is a single construct or multi-faceted. Identity development towards being a manager will be traced through the life course to a journey in three specific contexts which is suggestive of an odyssey. I shall start with early life experiences and analyse experiences that influence and shape individual identity before engaging in work. As will be illustrated, the values and beliefs that are developed in this formative life phase together with feelings of self-worth become essential to developing the confidence to perform the first-line manager role. Secondly, work experiences provide valuable contributions in exposing individuals to manager behaviour and an understanding of work culture and ethos. It also supports an exploration of occupational identity. The third context is arrived at when individuals actually begin to perform the role of a first-line manager and develop a manager identity. At this stage, individuals are also exposed more overtly to issues of power and control, not just as a recipient, but as a practitioner. This analysis will review influences on learning from both significant people and the contexts in which learning occurs.

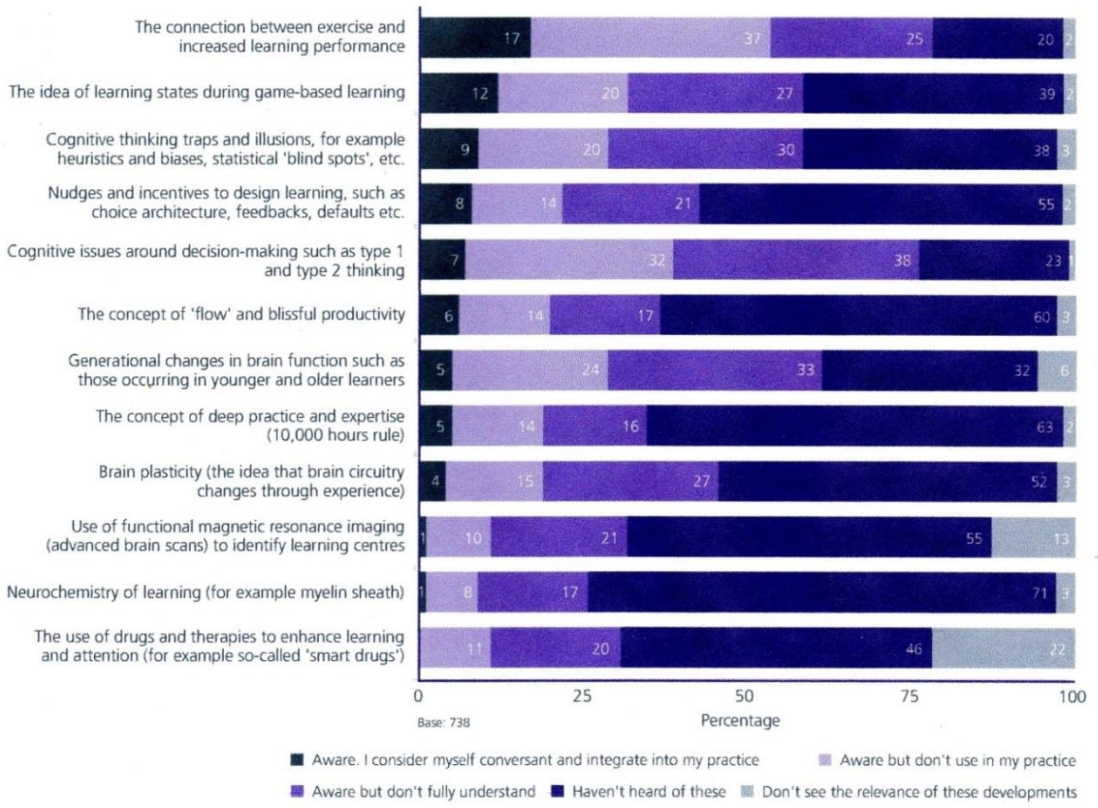
3.2 Learning

What is learning?

The study of learning was recognised as far back as the 1990s as a “complex and confusing arena” (Dixon, Adams & Cullins, 1997, p.59). It is a vast field of study with theories and orientations emanating from diverse traditions, including, but not limited to anthropology, psychology, and sociology. There is a “problematic assumption that ‘learning’ is a single object, self-evident and mutually understood” (Fenwick, 2010, p.80). Learning covers the domains of academic education and training through practitioner development. Difficulties arise in studying the topic as “there is little agreement on how even to define learning” (Taylor & Furnham, 2005, p.16). Fenwick (2006) notes in the context of learning at work that some writers even refuse to attempt a definition. The scope of conceptualisations in the field of learning is illustrated by a CIPD survey (2012b) which explored awareness of emerging

Table 3.1 Methods of learning analysis

Figure 10: How aware are you of the following methods of learning analysis? (% of respondents)



themes in the study of learning analysis, shown in table 3.1. Despite the breadth of interest, only two categories in the list reveal awareness by over 30% of respondents (n=764), exercise and increased learning performance (54%), and learning states in game-based learning (32%). This perhaps reveals a gap between studies of and approaches to learning in the practitioner and academic worlds, as well as continuing fascination with the topic.

Before considering the range of definitions of learning, a fundamental dichotomy in the use of tropes needs to be explored. Is learning a product, an outcome of an activity, or is it a process, a continuous state?

Learning as a noun or a verb

The dominant view in the literature is that learning is a product and is evidenced by educators using learning objectives to express outcomes (Fenwick, 2006). Hager (2004, 2008) argues that the idea of learning as a product is persuasive and is associated with a 'common sense' view of learning. Such a standpoint is premised on two assumptions that can be problematic; firstly that learning products need to be stable over a period of time as objectives necessarily limit learning content. Some learning products, for example learning how to place an injured person in the recovery position, may remain constant, but others, such as the interpretation of employment legislation in Tribunals and Courts can change significantly. Secondly, there is consistency in the ways that learners learn. Fundamentally, however, "the only thing common about common sense is the commoner's belief in it" (Benoit, 2010, p.19). Changes in learning practices continue to occur, not least, because of the use and application of information and communication technology.

To consider learning as a noun, an outcome or a product, suggests a form of reification that treats learning as an entity with physical characteristics. Wenger (1998, p.58) defines reification as "the process of giving form to our experience by producing objects that congeal this experience into thingness". This implies that we recognise learning by *association* with an object, as learning processes themselves are not intangible. Whilst it is possible to witness some of the consequences of learning, either in progress or when it is complete, cognitive learning itself is not visible. Viewing learning as an outcome is considered "an old problematic" (Varenne, 2009. p.337), as it positions learning as a set of needs that can be collected, almost as part of a standard curriculum.

An alternative view presents learning as a process, a verb, although grammatically this is a gerund. This is quite distinct from learning as a product, as it connotes something more

processual, progressive and developmental. It is personal and unique, even evoking a sense of individuality, a key postmodern stance. Suu Kyi notes (2002, foreword), "the true development of human beings involves much more than mere economic growth. At its heart there must be a sense of empowerment and inner fulfilment". Fenwick (2006) even suggests that treating learning as a process could form part of an individual's teleological quest", a view that finds echoes in the views of Frankl (1959), who proposes that man's purpose is a continual quest for meaning. Eraut (2004, p.266) also supports such a position in his discussion of "a lifelong learning trajectory", a pathway described towards the future. Learning as a process identifies learning as a social construction: it is experienced by individuals in conjunction with others, yet is particular to each.

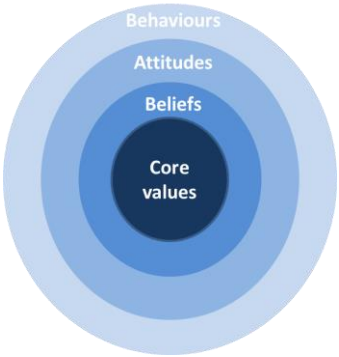
Definitions of learning

Fenwick (2010, p.80) suggests that learning can refer "to skill development, information access and personal consciousness-raising for individuals", which connotes a broad area of study. She had earlier suggested that learning is "innovative creation, refinement of practices and procedures, ongoing meaning-making, personal induction, cultural transformation, information transmission, change implementation, individual human development, and collective consciousness-raising" (Fenwick, 2006, p.273). As this list of attributes is so wide-ranging and unfocused it is unhelpful to structure a deep level of analysis.

Knowles (1998, p.10) suggests that "learning is the act or process by which behavioural change, knowledge, skills, and attitudes are acquired." This is confusing as too many issues are conflated. Cureton and Royce (2014) clarify these terms by arranging them as an 'onion skin' model of superimposed layers, shown as figure 3.1. However, Knowles' definition is too limited as it only considers one facet of learning, acquisition. Mumford (1993, p.45) defines learning as "knowledge, skills or insights obtained as a result of a planned or unplanned experience, of relatively immediate application". This seems much more suited to the domain of training, which aims to provide timely learning for a specific use or need. Mumford's definition also maintains the limitation of the acquisition theme, as does Wright (1980, p.100), who goes further by suggesting that learning is "not necessarily accompanied by intent" and may be "incidental, acquired without a conscious purpose". Jarvis et al., (2003, p.vii) define learning as "the process through which we become the human beings we are, the process by which we internalize the external world and through which we construct our experiences of that world". This is more helpful as it permits a fragmented, postmodern

understanding and moves the discussion away from grand statements or theories towards an individual construction. It also signals a link to identity.

Figure 3.1 'Onion skin' model of values and behaviours



It is worth noting that some writers, (for example, Malcolm et al., 2003; Eraut, 2004; Straka, 2004; and Eraut, 2011) attempt to elicit differences between formal and informal learning. This can be unnecessary and artificial as both formal and informal means do actually lead to learning (Marsick & Watkins, 1990; Malcolm et al., 2003). I agree with the views of Colley et al., (2003, p.8), who consider the differentiation argument sterile as "it is not possible to separate out informal/non-formal learning from formal learning in ways that have broad applicability or agreement".

Having explored how the term learning has been used by others, I shall now consider a relevant definition for this thesis. I am drawn to the work of Illich (1970, p.65), who suggests that "most learning is not the result of instruction. It is rather the result of unhampered participation in a meaningful situation". This is relevant for a number of reasons. Firstly, it implies that an individual will learn independently of teaching. This connotes personal confidence and possibly being epistemologically secure as a person, a theme that resonates with identity which will be examined in this chapter. Interestingly, Rogers (1951, p.104) has suggested that "only the *process* of seeking knowledge gives a basis for security" (emphasis in the original), not the content. Secondly, Illich's definition locates learning as a social activity. Even self-study through reading a book is innately social as the book will have been written by another, and confirmation that learning has occurred may only be judged by subsequent action by an individual. For example, a student may learn new concepts, but may only come to recognise this when confronted with an examination question, or in response to a question at a job interview. Finally, Illich recognises the relevance of context

and its significance to the learner. I shall propose a definition of learning after the synthesis of learning theory later in the chapter.

Theoretical approaches to the understanding of learning

Given the crowded terrain of learning, table 3.2 provides an overview of the dominant themes from theory. A number of writers (including Merriam & Caffarella, 1999; Caley, Reynolds, & Mason, 2002; Taylor & Furnham, 2005) suggest that there are four main orientations to the understanding of learning; cognitivist, behaviourist, social and situational, and humanist. From these four categories, I shall justify the use of those orientations which are most germane to the understanding of how individuals become a first-line manager. The themes I shall pursue emerge from my field data, not just out of appeal or availability of access, but as a consequence of adopting an abductive research strategy.

Table 3.2 Overview of approaches to the study of learning

Learning Theme	Theories	Central argument	Key writers
Cognitivism	Assimilation theory	Learners logically structure new experiences against existing knowledge.	Ausubel
	Attribution theory	Learners seek the causes of actions or behaviour.	Weiner
	Banking theory	'Deposits' of knowledge are stored in learners head for future use	Freire
	Cognitive development	Learners resolve understanding through mental processes.	Dewey, Piaget
	Cognitive load theory	Learners' capacity to remember facts is related to the complexity (load) of the topic.	Sweller
	Component Display theory	Learning outcomes require different learning conditions and strategies.	Merrill
	Discovery learning	Learners develop understanding through their actions and exploration.	Bruner
	Experiential learning	Learners draw on life experiences and follow four stages to lead to understanding	Kolb
	Gestalt theory	Learners need to see 'the big picture' before analysing detail.	Tolman
	Mental models	Learners create their own version of the world against which they make sense of situations.	John-Laird & Byrne
	Schema theory	Learners develop frameworks to digest new knowledge and experiences.	Andersen
	Transformative learning	Changing individuals' frames of reference	Mezirow
	Zone of proximal development	Identifies the potential limit for development	Vygotsky
Behaviourism	Classical conditioning	Learning occurs as a conditioned response when an individual makes associations	Pavlov

Table 3.2 Overview of approaches to the study of learning

Learning Theme	Theories	Central argument	Key writers
		between two unconditioned stimuli.	
	GOMS model	This theory aims to predict what experienced workers will do in an unpredictable situation.	Card, Moran, & Newell
	Operant conditioning	If learners have a good experience it will be repeated, whereas if it is bad it will be avoided if the situation reoccurs.	Skinner & Thorndike
Social and situational	Action Learning	Learning occurs in groups by using programmed knowledge and questioning.	Revans
	Communities of practice	Through legitimate peripheral participation newcomers become experienced workers.	Lave & Wenger
	Cognitive apprenticeships	Masters share their heuristics with less experienced workers.	Collins, Brown & Newman
	Knowledge creation	Learning as a collective process in a context	Saloman & Perkins
	Problem-based learning	Group learner-centred learning where problems are presented to develop solutions.	Barrows
	Situated learning	Learning is a social process in a specific context.	Wenger
	Social behaviourism	Self is understood by interaction with others	Mead
	Social development theory	Social interaction precedes learning.	Vygotsky
	Social learning theory	Learning occurs with others by observation, imitation and modelling.	Bandura
	Workplace learning	Conflates work and learning by recognising the potency of occupational contexts.	Boud & Garrick
Humanistic	Emotional intelligence	Learners understand how their behaviours affect others and moderate their behaviour.	Goleman
	Hierarchy of needs	Learning progresses through a hierarchy, once lower level needs are satisfied.	Maslow, McClelland
	Pedagogy of the oppressed	Learners co-create knowledge rather having it imposed by educators.	Freire
	Self-determination theory	Individuals are driven by intrinsic needs for autonomy, competence and through security found in relating to others.	Deci & Ryan
	Student-centred learning	Learning aims derive from learners needs	Rogers

Orientations to learning

Cognitivist orientation

Cognitivist approaches to learning explore mental processes where “understanding resides in the head” (Tsoukas, 1996, p.16). Influential theorists in this orientation are Piaget (1929, *inter alia*), and Vygotsky (1978), although he later came to be recognised for his work in social learning. Notwithstanding that their work was exclusively focused on children, their ideas have relevance for this study as this study explores learning throughout the life course.

Piaget proposed five stages of increasing cognitive development up to the age of fifteen. His work is therefore limited as he did not consider learning in older children, and he is also criticised for implying that cognitive development preceded learning (Jarvis et al., 2003). Vygotsky developed cognitivist theory by wanting to find out the potential for learning growth, defined as the gap between a child's development level (at their age) and the potential to develop "through problem solving under adult guidance or in collaboration with more capable peers" (Vygotsky, 1978, p.78). He termed this concept the zone of proximal development. Whilst this theory has been adopted and applied in other literature not exclusively focused on children, the concept has relevance to this study as analysis of the data reveals the importance of early life development in individuals becoming a manager.

Mezirow is credited with the notion of transformative learning, which he defines as "the process of effecting change in a "*frame of reference*" (Mezirow, 1997, p.5 emphasis in the original). Although his work is not premised on research-based argument (Jarvis et al., 2008) and should therefore be treated with caution, he argues that these frames of reference are either habits of mind, embedded ways of thinking, or points of view that change dependent on the context. This will encourage individuals to reflect on their experiences and modify ideas they have developed (Kolb, 1984). This suggestive of learning as a noun.

Behaviourist orientation

The Behaviourist orientation has been defined as "any more or less permanent change in behaviour which is the result of experience" (Borger & Seaborne, 1966, p.16). It is concerned with measuring learning outcomes that are observable and as such is a very focused and limited view of learning, as it concerns development in controlled conditions against a prescribed curriculum, indicative of learning as a noun. Two key themes are, however, important. Firstly, Pavlov (1927) developed the idea of classical conditioning. Learning occurs as a conditioned response when an individual makes associations between two unconditioned stimuli. Jarvis et al., (2003) criticised the theory suggesting that this may not actually be learning, but simply a reflexive response. Nevertheless, the behaviour of one person has the potential to influence the behaviour of others. Secondly, operant conditioning, based on the work of Skinner (1953) and Thorndike (1901) concerns reinforcement for behaviour – if an experience is good, it will be repeated, whereas a negative event will be avoided if the situation reoccurs. The intention of this orientation to learning is for learners to produce 'a correct response' to a specific situation and limits learning to knowing 'what', propositional knowledge rather than knowing 'how' and 'why' and is suggestive of learning as a noun. In the context of manager learning, this would be

associated with managers needing to understand corporate policies and procedures akin to 'managing by numbers' (Hood et al., 2009) with no use of discretion or professional judgment.

Social and situated learning orientation

Social and situational learning turns the attention on learning away from the psychological towards the context within learning occurs and the relationships that support and sustain it. The root of this orientation can be traced back to the work of Mead (1934) who proposed the idea that the mind and the self can only be understood by how they are demonstrated socially, i.e. to other individuals. Bandura (1978, p.*vii*) built on the work of Mead and proposes that social learning theory is "a continuous reciprocal interaction" so that people could have the opportunity "to influence their destiny as well as the limits of self-direction". However, when people interact, their actions will be judged by others against group or societal norms and this may lead to insecurity. Lave and Wenger (1991) sustained the social nature of learning through the notion of communities of practice: individuals start from a position of legitimate peripheral participation, and through engagement with others develop mastery of a work area. A key difficulty with their work is that they are not explicit about the process or path that leads from outsider to master. Wenger (1998, p.6) did, however, further recognised the importance of the context, as learners organise their life around work activities and in so doing "develop or preserve a sense of themselves", a comment that signals a link with identity. Boud and Garrick (1999, p.7) saw traditional approaches, that viewed knowledge as the province of formal education and workplace learning as "somehow tainted", as flawed. They viewed learning at work as a separate discipline and argued that it should be viewed as a highly contextualised form of learning. As learning in this orientation is moderated through contact with others, learning through interactions with others suggests learning as a verb.

Humanistic orientation

Humanist approaches to learning emphasise self-directed learning wherein an individual takes responsibility for fulfilling his potential through growth and development. It is based on the notion that learning is a natural human condition that is approached with enthusiasm and is distinctive to each individual as it highlights "the importance of the inner world of the learner and place the individual's thoughts, feelings and emotions at the forefront of all human development" (Williams & Burden, 1997, p30). However, emotions may need moderation when dealing with others, which is recognised by studies in emotional intelligence that were introduced in chapter two. Goleman, 1995; Goleman et al., 2002) As

the central focus of this orientation to learning is the individual, it is they who have the potential to set limits on what they are capable of achieving (Deci & Ryan, 1985) and this is based on their level of unsatisfied need (Maslow, 1943; McClelland, 1961). Critical human resource development (Sambrook, 2007), can trace its roots to this orientation to learning which introduces notions of emancipation and individual freedom.

For the purpose of this study, the value of this orientation appears initially to be limited, as the research participants learnt in an occupational setting, which structured and controlled their learning agenda. This gives rise to two tensions. Firstly, it means that an individual's view of learning is influenced by, and potentially restricted by interactions with others. Secondly, whilst each may have individually motivated aspirations for their future careers, these may have to be moderated by the dominant view of the employer, who may not share such personal development and learning dreams. However, if the focus is on individuals who can exercise agency over what and how they learn, they have choice over what they do and learning in this orientation can be considered a verb.

Summary of orientations to learning

It is helpful at this point to summarise the ideas explored thus far. None of these orientations can be considered exclusive as they can operate simultaneously. Using an example for illustration, an individual in a new social setting may gain acceptance from others by changing his behaviour. This may occur simultaneously whilst cognitively processing the behavioural norms of the context and as a result feel fulfilled as a person. Each can add to the possibilities for understanding how individuals learn. Ontologically, two of the four orientations, cognitivist, behaviourist and social relate to realism in which "both natural and social phenomena are assumed to have an existence that is independent of the activities of the human observer" (Blaikie, 2007, p.13). In the cognitivist and behavioural domains, that which is to be learned is guided and directed by others, so their reality is imposed on an individual.

In the social and situational and humanistic orientations, although learning is moderated through interactions with others, individuals do have some opportunity to exercise personal agency which is associated with an idealist ontology and a constructivist epistemology.

Table 3.3 presents a summary of the literature explored thus far, and will be developed further in the chapter to lead to a conceptual framework for later analysis of the stories of the research participants becoming a first-line manager. Given that I have recognised that all

four orientations do not operate independently, the framework is only proposed as a *schema* to aid understanding in the Kantian etymology of the word as "the means by which similar experiences are assimilated and aggregated" (Marshall, 1995, p.*vii*). It is not proposed as a rigid and fixed set of exclusive delineations.

Table 3.3 Orientations to learning

	Orientations to learning			
	Cognitivist	**Behaviourist**	**Social**	**Humanist**
Ontology	Realism		Idealism	
Epistemology	Empiricism		Constructionism	
Noun or verb?	Noun	Noun	Verb	Verb

Metaphors for learning

The study of learning has more recently returned to the use of metaphors, as "a good metaphor implies an intuitive perception of the similarity in dissimilars" (Aristotle, 1924, p1459). Metaphors have been used since ancient times and are considered an epistemologically sound approach in the social sciences (McCourt, 1997), as they support an understanding of the complex by starting from the familiar (Tsoukas, 1991). Exploring understanding through metaphors has been recognised as "one of the most important devices by which knowledge is generated (Gherardi, 2000, p.1058), as they connote meaning and expose a broader range of interpretations. In contrast, literal language assumes a singularly understood view of the world as it specifies and denotes objects and meaning. Using metaphors to enquire into learning privileges my further exploration into the intangible and conceptual nature of learning. Different writers have explored a range of metaphors for learning and a range of these will now be examined; learning as acquisition; learning as experience; learning as participating; learning as knowledge creation; learning as reflecting; and finally learning as becoming. Using a number of metaphors adds to the nuances of interpretation and is consistent with the views of Morgan (1980, p.612) who advises that "no one metaphor can capture the total nature of organizational life".

Learning as acquisition

Learning as acquisition is, according to Sfard (1998), a dominant view of how human learning has historically been understood, and is associated with rational scientific enquiry (Klabbers, 2000). Concepts and facts are transferred to individuals and stored for future personal use. Learning is considered to have taken place when content has been received into the mind of the learner (Elkjaer, 2004). Freire (1993) recognises this issue, but is critical

of practice whereby knowledge is treated as deposits from teachers to be 'banked' for later use, which suggests a relationship between learners and teachers that reinforces notions of control and power. In this form of learning, the acquisition of knowledge is considered more important than processes of learning (Colley et al., 2003), as knowledge is positioned almost as a product, a commodity to be obtained from experts by passive recipients (Sambrook, 2001). This treats the "mind as a container of objects" (Bereiter, 2002, p.2) and is illustrated aptly with the notion of 'Jug and Mug' (Mager, 1991: Bowles & Gintis, 1976). The expert who has built up 'jug'-sized knowledge 'pours' this into the smaller 'mugs' of learners' less-developed minds, suggesting learning as a noun that involves cognitive process.

The acquisition metaphor does have its limitations. Haskell (2001) reminds us that knowledge is not a commodity that can be transferred between contexts. The notion of knowledge transfer is contested as transfer "seems to vanish when experimenters try to pin it down" (Schoenfeld, 1999, p. 7). Hodkinson (2007) asserts that "it's people who move, stupid", suggesting that individuals need to question the relevance of what has been acquired from one context and apply it selectively in another. Knowledge as a product can be subject to individual and personal interpretations as that which is acquired is "gradually refined and combined to form ever richer cognitive structures" (Sfard, 1998, p.5). This means that acquisition is idiosyncratic as it does not transfer to individuals uniformly. It requires personal and individual processing, an issue recognised by Hager (2004, p.27): "gaining high level proficiency in a discipline more resembles the "gradual clearing of a fog in a landscape" than atom-by-atom acquisition of content". Acquisition is also concerned with propositional knowledge, discussed above. Learning facts alone might suggest formulaic solutions to situations which can be useful in routinised processes, for example health and safety or knowing what to do as a manager with staff misconduct. However, in *situations* that require the exercise of judgment, acquisition of knowledge will limit an individual's capacity ability to apply new knowledge only to what has been learned. This limitation is perhaps why Rogers and Frieburg (1994) suggest that anything that can be taught is rather inconsequential, although I would argue that if individuals are shown how to acquire the skills to think and to interpret situations, they would have the potential to manage new and emerging situations.

Learning as experience

This metaphor considers the subjective experience of learners and can be useful to reinforce ideas that may have been learned earlier; "more *uncovery* than discovery learning" (Reynolds, 2009, p.389). Connolly (2011) recognises this point in using an interesting simile

for experiential learning by likening the development of knowledge to a half-built construction. Experience permits learners to build on their existing knowledge to complete 'the whole construction' by exposure to, and application in differing contexts. Experience learning has also been recognised as knowledge through relationships (Burnard, 1987), hinting at learning being a continuing and developing social act.

Yet, the act of gaining experience may or may not be conscious. Although Beard and Wilson (2002, p.16) define experiential learning as "insight gained through the conscious or unconscious internalisation of our own or observed interactions", there is no consistent discipline over what is learned and how this occurs. Perhaps in an attempt to make learning more of a conscious action, a number of writers, most notably Kolb and Fry (1975) have proposed a simplified process to articulate experiential learning; concrete experience, reflective observation, abstract conceptualisation and active experimentation. However, they ignore the context where learning takes place and the emotions of individuals (Jarvis, 2004), possibly because the model originated from experiments to discover how individuals solve problems. Whilst problem solving can lead to learning, this is too restricted a focus, and in any case, experiential learning is also limited by the availability of problems that need solving and the disposition of learners. The more adventurous and curious they are, and the more complex the environment in which individuals engage, the greater potential they have for learning experiences. This is recognised by Miller and Boud (1996, p.8) who suggest that learning as experience "is influenced by the socio-economic context in which it occurs". They continue by suggesting that it involves the "totality of ways in which humans sense the world and make sense of what they perceive", redolent of cognitive processes. Further, as it "relates to an external phenomenon" (Jarvis et al., 2003, p.54) this metaphor can be considered a noun.

Learning as participating

This metaphor extends thinking about learning beyond the development of individual and personalised cognition, to active engagement with others. Eraut (2000, p.130) recognises that "knowledge is shaped by the context(s) in which it is acquired and used". As a social process, it concerns itself with the process of 'knowing' rather than knowledge as a product or outcome, and occurs through engagement in activities (Billet & Somerville, 2004). Lave and Wenger (1991) proposed situated learning theory and offer the idea that an individual starts as an outsider on the periphery of a context as an apprentice and through participating with others in 'communities of practice,' they attain mastery; newcomers eventually become old-timers. Their work has been subject to criticisms from a number of writers. Implicit in

their work is that learners start as *tabulae rasae,* empty 'slates' to be 'filled' through participation with others. This ignores the possibility that learners carry forward prior experience to use in a current position, and treats newcomers as "almost completely impotent vis-à-vis the community" (Hay, 1993, p.93). Lave and Wenger (1991) limit their focus on learning to that which starts only on entering the context. Secondly, engagement in a community of practice requires some initial knowledge to be a participant (Hay, 1993). Lave and Wenger (1991) do recognise that new apprentices may begin to acquire knowledge by doing rather than through participation. Without any knowledge, an outsider has nothing to contribute and may result in an initial period of "benign community neglect" (Lave & Wenger, 1991, p.93). Thirdly, Hodkinson and Hodkinson (2004) suggest six criticisms, omissions that have not been included in Lave and Wenger's work. Their key criticism that is relevant to this study is the implications of differing levels of access to learning due to power differentials in social learning processes. Not all the participants were offered access to learning possibly due to an inequitable distribution of resources. I consider the sources of power influences in learning to be wider than just access and can include staff being intimidated to ask for learning support as this may signal potential weakness and a lack of ability in the job.

More recently, Guile (2014) notes a recurring criticism of Lave and Wenger about their lack of recognition for the contribution that educational establishments can make to learning. He discusses the well-rehearsed problems associated with knowledge transfer from one context to another and that Lave (1996) subsequently recognised the limitations of the notion of transfer to reconcile tensions between theory and practice, justifying her use of the word 'participation'. Learning is not the exclusive domain of a community of practice as recognised earlier in this chapter both formal and informal learning both lead to the occurrence of learning (Colley et al., 2003, p.8),

A final personal criticism relates to the route from legitimate peripheral participation to mastery. Lave and Wenger (1991) offer no guidance about identifiable stages in that journey. It would appear that presence in a community is sufficient to privilege learning. This area of concern is also addressed by Hodge (2014) who suggests that despite participation and engagement, some individuals may not actually become full members of a community. If there is no engagement with others, then there are limits to learning with others.

However, the idea of learning with others is persuasive. Learning through socialisation and peripheral participation is recognised by Eraut, et al., (1998), who despite introducing the idea that individuals learn by self-directed 'doing', sustain a focus on participation with others

through activities such as coaching and supervision, and target setting, both of which are often considered the day-to-day activities of a workplace. Learning can be viewed as a social and inter-personal process suggestive of a continuing process (verb).

Learning as knowledge creation

The knowledge creation metaphor, also referred to as construction (Hodkinson and Macleod, 2010) suggests that learning occurs in specific contexts as individuals engage in practices and routines; they apply what they have learned previously and adapt this to help solve a current problem and then share what they have discovered with others. An example from Spraggon and Bodolica (2008) illustrates this with a case study of prototyping in Canadian software firms. Engineers apply their existing knowledge to new applications which is then tested by others. This is a view echoed by Salomon and Perkins (1998, p.2) who posit learning "as a collective participatory process of active knowledge construction emphasizing context, interaction, and situatedness".

Paavola et al. (2004, p.558) propose this fourth metaphor as "a promising way of softening the contrast between those two perspectives", acquisition and participation, which can be seen as incommensurable. The metaphor of learning as knowledge creation draws on the work of two key writers Nonaka and Takeuchi (1995), who consider two forms of knowledge, tacit and explicit. They argue that knowledge can be considered a "spiral" based on different forms of knowledge conversion; from tacit to personal knowledge that is shared with others (socialization); from tacit to explicit through the codification, for example in writing standard procedure manuals (externalization); from explicit to explicit by cross-referencing one piece of knowledge with another, for example unacceptable staff behaviour that falls under health and safety policy with staff disciplinary procedures (combination); and finally from explicit to tacit when knowledge becomes an unquestioned part of an individual's normal work behaviour (internalization). Nonaka and Takeuchi argue that viewing knowledge creation through four 'spirals' is a broader approach that can lead to innovation and change. In contrast, the use of propositional knowledge can lead to inertia through its limited focus on facts, the so-called "paralysis by analysis" (Nonaka & Takeuchi, 1995, p.198).

Gherardi (1999, p.114), in drawing on the work of Polanyi (1957), proposes that the "creation and recreation of knowledge is not located in the heads of individuals, but is social and public". Engeström (1987, 1999) develops this further with the view that individuals exist in and are an integral part of their social context; they create and are created by their

environment. Knowledge creation occurs through questioning and discussion with others as a form of sense making.

The viewpoints of both Nonaka and Takeuchi and Engeström point to learning being an inherently social exercise in a context, although it is questionable whether the sharing of existing knowledge will lead consistently to new knowledge being created. Bereiter (1985; 2002; and Scardamalia & Bereiter, 2006) perhaps provide more realism by thinking less about knowledge creation than knowledge *building*, which draws more closely on pre-existing knowledge. He identifies a key limitation in exclusively individual forms of learning, as "it is necessary to attribute to the learner a prior cognitive structure that is as advanced or complex as the one to be acquired" (Bereiter, 1985, p. 202). An individual may not possess the capacity to create new knowledge alone, without the contribution of others. Yet this may be contingent upon the sharing of a common reality – zones in the reality of everyday life (Berger & Luckman, 1966). Knowledge building can only occur when a shared reality is perceived to exist. As such, this metaphor is positioned across all four orientations.

Learning as reflecting

The discussion about learning by experiencing does not lead to a complete understanding as there needs to be recognition that learning has actually taken place, not least to the learner. Whilst engaging in work activities can provide learning opportunities, Marsick and Watkins (1990, p.8) argue that "learning takes place through an ongoing dialectical process of action and *reflection*" (emphasis added). This is developed further by Jordi (2011) who posits that reflection is not just an analytical, cognitive process to reveal knowledge from experience, but a complex internal dialogue between experiences and thinking. Simply put, he offers a view of reflection as a personal narrative that seeks to reconcile and resolve novel experiences with the already experienced. The views of Ibert (2004. p.1531) build on this by suggesting that in an organisational context, reflection "refers to the ability of the organisation's members to review the principles, which guide their actions, challenge and replace them by new standards." In a similar vein, reflection by individuals is described as "comparing their own reasoning with or problem solving processes with those of an expert of peer" (Cheetham & Chivers, 2001, p.258).

Reflection is referenced in a wide range of learning theory, although there are differences in its application. The work of Kolb and Fry (1975) has already been considered and it is criticised for not analysing in detail the actual process of reflection (Smith, 1996). Schön (1983, 1987) refers to the idea that through reflection individuals can adjust behaviour

impulsively and without considered thought in response to circumstance (reflect-in-action). This is often thought of as nous (Gold et al., 2011) and it has the potential to raise creative possibilities for future use. Schön (1983, p.62) describes reflection as of paramount importance in the workplace: "reflection in action is central to the art through which practitioners sometimes cope with the troublesome divergent situations of practice". He distinguishes this from reflection-on-action, which is conducted when a task is completed and can be reviewed: an individual "reflects on the phenomenon before him and on the prior understandings which have been implicit in his behaviour" (Schön, 1983, p.68). Berings et al., (2005, p.388), comment further about the post-event reflection in that "not only the learning outcomes are evaluated but also the way these outcomes are achieved". Both the content and process of learning are reviewed in this approach to reflection.

Mezirow developed the ideas of Schön further by introducing the idea of critical reflection. This involves individuals in a process of questioning their practice and exposing themselves to the ideas of others that might inform future practice. This *"reflection on one's own premises can lead to transformative learning"* (Mezirow, 1990, p.6, emphasis in the original). This leads to individuals developing new frames of reference, a theme taken up by Kempster (2009, p.57), who commented that the "ability to reflect at depth is seen to be triggered by transformative incidents or episodes that call into question a person's learning history and assumptions about the world". Critical reflection challenges individual feelings and beliefs and can lead to suggestions for future practice.

Thus far, the discussion suggests that reflection is a cognitive process of relating immediate to past experience, and is perhaps why Jarvis (2004) links this form of reflection to contemplation. This limits our understanding of reflection for two reasons. Firstly, there may be no consistency in an individual's capacity to reflect. One may be able to engage in a deep, inner exploration and another not. Mumford & Gold (2004, p.101), suggest that in an occupational setting reflection "is sadly absent in the working and learning practices of many managers". Whilst different experiences may give rise to different levels of reflection, reflection would appear to be idiosyncratic. Whilst it could be argued that 'reflection is reflection', this is unhelpful in clarifying understanding. Secondly, there is no link from cognitive process to action, a stance supported by Mezirow who was critical of Kolb for polarising reflection from action. Action, even if it is premised on prior thought, requires a conscious effort for an individual to make a change. This suggests a multi-faceted view of reflection that involves all four orientations.

Learning as becoming

The five metaphors for learning discussed thus far privilege an extended discussion about learning by relating a complex subject to ordinary ideas. This broadens the scope for richer analysis. More recently, learning has been explored through a sixth metaphor; learning as becoming (Colley et al., 2007; Hodkinson & Macleod, 2010). This develops the five metaphors already introduced and reinforces the dynamic nature of learning as a continuing process. Knowledge acquisition and creation, and learning as participation are not static; they evolve through experience and exposure to differing contexts. Learning has for a number of years been recognised as "an ever-present process" (Dewey, 1938, p. 52) through experience and reflection. Additionally, it is not selective as it "can be highly significant or equally trivial" (Hodkinson et al., 2007, p.12). This point about relative worth is relevant to the study as learning recognises that resolving "wicked problems" (Rittel & Webber, 1973, p.162) as well as small incremental discoveries can contribute to an individual's development as a person, one form of becoming. Indeed, whilst learning focuses on change for an individual, the processes of learning may also influence change and becoming in others, and even the context (Keiran et al., 2003). These different considerations for learning aid individuals' teleology, their own *becoming*. Hager and Hodkinson (2011, p.44) recognise the importance of this metaphor in professional learning partly due to the limitations on the other metaphors, but because it "can overcome unhelpful dichotomies . . . between structure and agency".

Yet, a central question remains. If individuals acquire knowledge, if they participate with others and build knowledge, does this enable them to become managers? Does learning enable a non-manager to become a manager? The question may seem tautologous, yet examples might illustrate the need for further examination. An individual may acquire knowledge of musical notation, create new music and even play an instrument (participate) with others, yet may never, for example, become a concert pianist. In this example, skills, not just knowledge are required. In another example, a politician may be coached to be a compelling public speaker without success. As an example, Norman Tebbit (The Telegraph/Blogs, 2011) in discussing a former political party leader stated that "Duncan Smith and oratory have never been close acquaintances". The metaphor of becoming augments an examination of learning into personal attributes and identity. Sturdy et al., (2006) suggest that there is an emotional attachment to acquiring knowledge which underpins personal narratives of identity. They view the metaphor of learning as becoming as a form of identity work that builds individual confidence. They see confidence as a key element that enables individuals to be considered managers. It is this, "rather than scarce practical skills, that gets them 'into the party'" (Sturdy et al., 2006, p.854). I thus have a link

from learning into identity, along with a number of writers who conflate learning with identity which will be explored later in this chapter.

Summary of metaphors for learning

As with orientations to learning, none of the metaphors can be considered exclusive as they too can operate simultaneously. For example, an individual in a new role as a first-line manager may acquire knowledge by the experience of performing the role and participating with his colleagues. If he is naïve about his situation, he may create knowledge and reflect that others could have done the same, whilst he becomes a manager. Ontologically, two of the six metaphors relate to realism; acquisition deals with facts and experience "relates to an external phenomenon" (Jarvis et al., 2003, p.54). Participating with others is a social process and becoming is an intensely personal occurrence. As knowledge creation requires others to recognise what has been individually constructed it can operate across both idealist and realist paradigms. Reflecting was argued earlier to be a multi-faceted view of learning and therefore operates across both domains. This is summarised in the developing schema, shown as table 3.4.

Table 3.4 Orientations and metaphors for learning

	Orientations to learning			
	Cognitivist	**Behaviourist**	**Social**	**Humanist**
Ontology	Realism		Idealism	
Epistemology	Empiricism		Constructionism	
Noun or verb?	Noun	Noun	Verb	Verb
Metaphor	Acquisition	Experience	Participating	Becoming
	---------- Knowledge Creation ---------- Reflecting ----------			

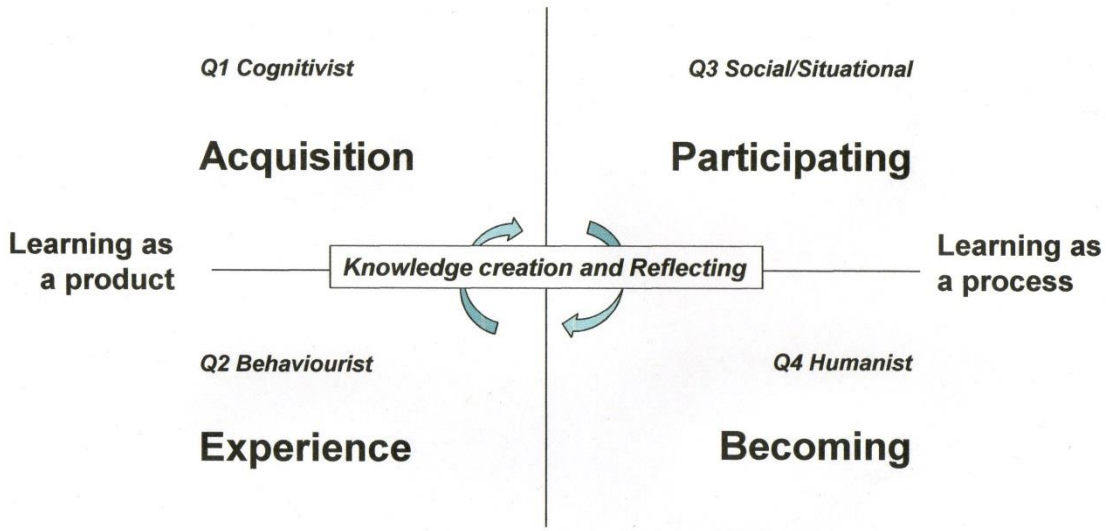
Summary of orientations to learning and metaphors for learning

It is helpful to display table 3.5 as a conceptual framework, shown as figure 3.2 still in the spirit of a Kantian schema. It shows the placement of acquisition and experience with cognitive and behaviourist orientations in quadrants one and two allied to learning as a product (noun). Quadrants three and four show participating and becoming linked with social and situational and humanist orientations allied to learning as a process (verb).

From this, I propose a definition of learning as *conducting oneself independently and confidently in differing contexts*. *Conducting oneself* relates to behaviour adaptations that arise from experience. *Independently and confidently* relates to the humanist orientation and

the emergent nature of learning as becoming. The importance of *differing contexts* recognises the need to acquire knowledge in addition to participating with others in social settings. This can be illustrated with an example. When an individual joins an organisation from elsewhere he is likely to feel gauche and insecure. New situations may raise doubts about his competence, his professional standing and his relationship with his colleagues. Learning presents the opportunity that enables him to gain the knowledge to perform his job without reliance on others, to behave appropriately in his new work setting and to share experiences with others. This in turn can induce feelings of security and confidence. This definition is germane to this study, as it will be shown that being able to work without constant referral to others and personal confidence are critical issues that are required to become a first-line manager.

Figure 3.2 Learning orientations and metaphors



3.3 Identity

What is identity?

In the same way that the topic of learning has been shown to be “messy” (Hermanson, 2009, p.13), so identity is a vast field of study that has also been undertaken in traditions of anthropology, psychology, and sociology. Dictionary definitions of identity suggest that the word is derived from the Latin *idem*, meaning the same and can be considered “the sameness of a person or thing at all times in all circumstances; the condition or fact that a person or thing is itself and not something else” (Simpson & Weiner, 1989, p. 620). However, a lay definition of identity is not helpful when examining identity, as this suggests internal consistency through which a person sustains an image that is distinctive from ‘the

other'. In addition, Fearon (1999, p.2) suggests that dictionary definitions tend to "reflect older senses of the word" and proposes that identity can be a social category which can be defined by rules of membership, attributes or behaviour; or innate distinguishing characteristics about which a person has some pride. This progresses the discussion as it implies moderation by others and the requirement to either adapt or assimilate the standards of others. Mehotra et al., (2014, p.14) sustains the social nature of "identity as something we do" which echoes the suggestions from Reedy (2009, p.104-105) of identity as "an existential quest for an authentic self".

Identity has been described as "an elusive concept and not a fixed construct" (Neethling, 2012, p.162), and its links with learning need to be examined for two main reasons. Firstly, identity is something that most of us "take for granted most of the time" (Watson, 2007, p.149) and is "relatively unproblematic" (Reedy, 2009, p.88). If it is taken for granted and therefore uncontested, it will be open to a wide range of differing interpretations. Secondly, could personal identity be in tension or competition with a manager identity? The control and conformity imposed by organisations discussed in chapter two suggests strongly those individuals who are employed as first-line managers are encouraged to behave in consistent ways (clones?) through adherence to instruments such as job descriptions and person specifications. Such impositions may challenge or threaten how individuals "become at home with themselves" (Bryant et al., 1997, p. 59) if they struggle with their sense of "oneness" (Ashforth & Mael, 1989, p.21). Some individuals may be very comfortable to self-identify as a manager; their image *is* their role, and this can sustain a form of ontological security (Billet, 2006; Giddens, 1991). In a contradictory way however, it may also lead to vulnerability and even anxiety if the experience of carrying out the role does not match their prior expectations and the expectations of the employer.

For the purpose of this thesis I propose a definition of identity as *the confident presentation of self in a circumstance where the self is distinguished from others*. Given that the circumstance in which an individual is located will change, this recognises the view of Keith and Pile (1993, p.28) that "identity is always an incomplete process". This also relates to my definition of learning as it recognises the importance of the context.

Theoretical approaches to the understanding of identity

Table 3.5 summarises the key theoretical positions in the three phases of development which will then be explored.

Table 3.5 Overview of approaches to the study of identity

Stage of development	Theories	Central argument	Key writers
Personal identity	Dialogic self	Centrifugal and centripetal utterances to distinguish 'I' from 'me'	Gergen
	Possible selves	Social experience transforms people	Markus & Nurius
	Potential persons	Idealised selves	Harré
	Self concept	The self is understood in relation to others	Mead / Gecas
	Self-presentation	Identity understood through image	Beech
	Tabula rasa	Minds start as blank slates to be inscribed by experience	Locke
	True self / essential self	The self-view that is kept private	Redfearn
Occupational identity	Coherence through utterances	Identity revealed through discourse	Billett
	Figuration	Networks of independent human beings	Elias / Markus & Kunda
	Identity regulation	Controls exercised by seven dimensions	Alvesson & Willmott
	Organizational socialisation	Adopting the language and culture of a context	Van Maanen & Schein
	Provisional self	Individuals become actual persons through transformations of experience	Ibarra
	Segmentalism	Individuals identify with different groups	Cohen
	Social identity	The self is a social construction to distinguish an individual from 'the other'	Tajfel & Turner
	Worker as performer	Identity revealed through actual tasks undertaken	FAME consortium Billett
Managerial identity	Emergent manager	A process of continual shaping in a changing world	Watson; Watson & Harris
	Managers as bricoleurs	Individuals use "diverse materials" to become managers	Down & Reveley
	Narrative accomplishment	Managers are revealed by their history and narrative performance as existential hero	Reedy
	New Identity	Becoming a manager involves leaving behind 'old' identities	Hill
	Professional / Managerial dichotomy	Managers struggle to assume accountability	Golden

Personal identity – the self

Studies of personal identity development can be confused by two dualities. The first is the debate between determinism and individual freedom. The English philosopher John Locke (1632-1704) is generally credited with the notion that at the start of life our minds are a *tabula rasa* or blank slate that can be filled by experience (Petryszak, 1981). In the individual struggle between the exercise of free will to make life choices and a competing idea that everything is pre-ordained, individuals do not start life with preformed ideas. Redfearn (1969, p.163) reminds us that the "first year of life is the period in which the identity theme,

but not yet the identity, is established". Each 'slate' is therefore individually self-inscribed through idiosyncratic experience and this makes us who we are.

A second dualism occurs between the psychological and sociological debate around the influence of nature, genetic inheritance; and nurture, environmental influences. This is illustrated by Harré (1995, p.373), who argues that learning to become anything is "socially guided and individually constructed in the course of human life". People are born as potential persons, and the process of becoming actual persons takes place through individual transformations of social experience". Through the life course, individuals may have "a continuous history" (du Gay, 2007. p.26), but influences on this history need to recognise that "neither nature nor nurture will provide ultimate truths and neither can be an end in itself" (Sameroff, 2010, p.20). It is the links between the two that prove interesting to seek answers to questions about how an individual becomes a first-line manager.

Harré's (1995) idea of a potential person is explored by other writers, albeit with some nuanced shifts in terminology. Markus and Nurius (1986, p.954) introduced the notion of possible selves which "are the ideal selves that we would very much like to become and the selves we are afraid of becoming . . . [and] are the direct results of result of previous social comparisons in which the individual's own thoughts, feelings, characteristics, and behaviors have been contrasted to those of salient others". This suggests if we wish to learn who we are, we engage in a series of experiments that possibly involves failures in the quest for self-understanding, if indeed this is ever found. This affirms the views of Weick (1993, p.346) who suggests that individuals develop a "repertory of possibilities", some of which are stored for later use. Stevenson and Clegg (2011, p.233) develop this idea by proposing that views of a possible self will influence personal motivation to pursue their life ambitions; "the more developed a possible self is, the more it motivates a person".

The self is a social construction to distinguish an individual from 'the other'; "selves can only exist in relation to other selves" (Mead, 1934, p. 164). This is developed further by Gecas (1982, p.3) as "a reflexive phenomenon that develops in social interaction". The self can be understood in the literature through the use of binary forms of the personal pronoun. In English grammar usage, the 'I' signifies the subject of a verb, but is understood by Mead (1934) as "the response of the organism to the attitudes of the others" (in Coser, 1977, p.338), implying an internal reaction. In contrast, the 'Me' represents the ways that a person reveals himself to others and is therefore treated as an object. The self is a complex binary that comes through discourse, a view supported by Beech (2008, p.54) who posits that "identity is a process that is both the outcome of, and the input to, dialogue".

Markus and Kitayama (1991) develop the idea that there are two presentations of the self, proposing that there is a private self, 'I', which Redfearn (1969, p.24) describes as a "true self, that is kept hidden from the public 'me'". Personal inner thoughts, aspirations and dreams which cannot be known to others, have been referred to as the avoided or hidden area by Luft (1970), and are consonant with Jungian theory of the persona (Jung, 1967, p.305) as "a kind of mask, designed on the one hand to make a definite impression upon others, and, on the other, to conceal the true nature of the individual". Gergen et al., (2004), contribute to the debate of the 'I' and 'Me' by suggesting that there are two forms of dialogue, which they refer to as 'utterances'. There are utterances that lead to coherence between the two, described as 'centripetal' dialogue, driving towards a centre, and the outward 'centrifugal' dialogue that lead to dissonance. This connotes that some elements of an individual's behaviour may affirm the identity they intend, and others aspects may lead to inconsistencies. For example, a manager may discuss her/his intention to be perceived by others as an ethical professional, yet openly engage in hearsay about the behaviour of others. This contribution is helpful as it enables an examination of personal consistency and the extent do individuals act in accordance with their self-developed values and behaviour sets (centripetal) or react against them (centrifugal).

However, Beech (2008, p.52) progresses the argument of the self beyond discourse, suggesting that it concerns "how the images and representations (physical, symbolic, verbal, textual and behavioural) become imbued with meaning and are taken as being part of one's identity". This infers not only the importance of the context within which self-identity is practised, but the choices that individuals make in presenting themselves through their style of dress - Harré's (1983) notion that learning is a series of 'identity projects'.

Occupational identity

In the previous section, I suggested that the self has an internal and external element and is shaped socially. Zaleznik (2008, p.213) suggests that this phase in life can be a personal crisis which is resolved "when the person finds an occupation and a place in society". Occupational identity concerns how individuals adopt the language, culture and rituals of a work context (van Maanen & Schein, 1977). It "refers to the extent to which an individual internalizes the occupation's identity as a valid definition of self" (Ashforth, Joshi, Anand, & O'Leary-Kelly, 2013, p.2427). As such, occupational identity arises when a group of individuals set demarcations that distinguish themselves from other groups of workers. Occupational identity not only relates to the ways in which individuals act whilst at work, it

can also be linked with social status. For example, to be a doctor can imply a higher standing than a contact centre worker. In a UK context, the BBC's Great British class survey experiment (Savage et al., 2013) linked the type of work undertaken to occupational class as shown in table 3.6. The implication is clear, the higher the level, the greater the social status.

Table 3.6 Proportions in occupational classes

Senior manager
Traditional professional
Modern professional
Middle/Junior manager
Intermediate
Technical craft worker
Semi-routine worker
Routine worker
Never worked

Conflating work with status implies that there are limits to one's social position without a job. For some individuals, their self-image is their occupation, and whilst this can provide them with a form of ontological security (Billett, 2006; Giddens, 1991), although in a contradictory way may also lead to vulnerability, if pre-expectations in a role do not match experience. In early pilot studies before I entered the field to engage with the participants, a response by a person to the invitation "tell me about yourself" produced almost exclusively answers that described a person's job role. Each seemed genuinely surprised when I suggested that such a description is what they *do*, perhaps not who they are. This recognises the view of McKee and Eraut (2012, p.272) that "people's identities go well beyond their working life, but their work is still a significant part of it".

Developing a work identity "is just one of a number of other, sometimes competing, identities that make up the overall identity of an individual" (FAME consortium, 2007, p.36). An occupation provides a structure through instruments such as job descriptions, personal specifications and the use of competency frameworks, which was shown in chapter two to exert strict control over what an individual does and how. An occupational identity is "typically linked to performance expectations" (FAME consortium, 2007, p.20). Whilst social influences shape the self, they assume greater importance in occupational identity, as the self is exposed to working formally in groups for which he is accountable for his actions. Starting a job presents a transformation phase for an individual which may challenge his sense of self as the "'I' becomes 'We'" (Thatcher et al., 2006, p.1077). A new context can

threaten the idea that “an individual strives to achieve a satisfactory concept or image of himself” (Tajfel, 1974, p.68) if it is perceived as alien to previous experience. Understanding oneself in emerging contexts is helpful for psychological well-being, neatly put by Thoits (1983, p.175) that “if one does not know who one is (in a social sense) . . . then one simply does not know how to behave”.

The assumption that the self has two elements is the main contribution of social identity theory and extends views of personal identity as self-knowledge of unique attributes to include motivation and achievement that can inculcate positive self-esteem. Occupational identity can be understood through social identity theory, defined by Tajfel (1972, p.292) as “the individual’s knowledge that he belongs to certain social groups together with some emotional and value significance to him of this group membership”. According to Haslam et al., (2003) it seeks to connect three social-psychological processes. Social categorisation reduces the focus on the idea of an autonomous person, as individuals examine the idea of the self that “we believe we have in common with others in the same social group” (Arnold, 2005, p.333). It is through the degree to which an individual conforms to the dimensions of the categorisation that they become accepted by colleagues as group members. Secondly, through social comparison, individuals can make value judgements about themselves in relation to groups and others; for example, the types of work offered to others, their salary levels and promotion prospects and position in ‘the pecking order’. Finally, social identification considers the degree to which individuals take their identity from a group or choose to exhibit only elements of a group identity and retain a private part of themselves.

The development of the self was previously shown to be influenced through the idea of ‘potential person’ (Harré, 1995). Ibarra (1999) adds a nuance in etymology in applying the notion to occupational identity. She introduces the interesting concept of ‘the provisional self as “temporary solutions people use to bridge the gap between their current capacities and self-conceptions and the representations they hold about what attitudes and behaviors are expected in the new role” (Ibarra, 1999, p.765). In short, she suggests that individuals experiment with their sense of self in a context by trialling behaviours and receiving feedback from others about what is expected. Occupational identity is influenced by the development of such self-awareness that can come from feedback from others (Hall, 2002), as “the self is modified to a great extent by social learning processes” (Erez & Earley, 1993, p.26). This is strongly suggestive of forms of control about what is an ‘acceptable’ image and will extend beyond the use of utterances to include signifiers such as dress (Beech, 2008). Occupational identity could therefore be part of a ‘bricolage identity’ through which an individual draws influences from a range of sources and “the decomposition of existing

identities into their constituent components and their recombination into a new identity" (Carruthers & Uzzi, 2000 p. 486).

Manager identity

It is tempting to start this section with the idea that manager identity is just another form of occupational identity. After all, it can be argued that a manager is simply distinguished from other workers by situated action, which was examined in chapter two. In one sense this is true, but the elevated social status of a manager occupation, shown in table 3.8 suggests that when an individual performs the role of a manager he may be perceived as different by others. This can be the case with subordinates who may view a recently promoted colleague to have 'crossed a line' and who cannot return to the fold. This gives rise to two dilemmas; firstly, whether the manager himself shares this view and secondly when exactly does an individual become a manager. This is further complicated when considering that the development of a manager identity occurs in situations that are "frequently ambiguous, discordant and contradictory" (Tietze & Musson, 2010, p.149).

Transition to a manager role can be just as difficult as starting work for the first time. It can take as long as two and a half years and is not always successful (Gabarro, 2007), as individuals may have a "simplistic and incomplete" (Hill, 2007, p.4) view of the role they have undertaken. Hill reported the case of one manager who appeared to have difficulty in letting go of his former responsibilities with the comment, "This was not a democracy. It was a kingdom and I was the king who would handle all the problems" (Hill, 2007, p.106). Hill sees the transition to becoming a manager as "a fundamental change in identity and point of view" (2007, p.276"). This view is shared by Elkjaer (1999), and both standpoints are redolent of leaving behind an old identity in the pursuit of mastery of a manager identity. Analysis of the data in this project challenged that view.

Problems encountered in transition to a manager role include unrealistic performance expectations and poor support from senior managers, changes in relationships with work colleagues and having more to learn than anticipated (Plakhotnik et al., 2011). Negative experiences of learning impact on self-confidence which can lead to a reduction in the exercise of agency (Biesta, Field, Hodkinson, Macleod, & Goodson, 2008). This could encourage an individual to retreat into his former life as a non-manager and lead to a professional-manager dichotomy (Golden et al., 2002) in which difficult choices may be incommensurable. Golden's point is illustrated in the case of social work practitioners who move into a management position and are often "pulled in different directions and confronted

by competing demands . . . having to balance competing priorities" (Patterson, 2014, p.8). Their professional integrity may be challenged by not being able to house a homeless adult due to a lack of available budget. This example notes that a change does occur when becoming a manager as a key element of the first-line manager role is the agentic exercise of power over others, such as customers, service users and staff, whilst at the same time being subjected to power and control by senior managers. A first-line manager is both an agent and a target of power. Being accountable for the actions of others can add to an individual's ontological insecurity as he may question how comfortable he is with accountability. This is associated with expressions such as "I'm just not the sort . . . It's not me" (Watson, 1996, p.330) and the example of taking a member of staff through disciplinary procedures illustrates the point.

Reedy (2009) contributes to the understanding of manager identity maintaining the Ricoeurian dualism. He views manager identity as a narrative project (narrativity) that links identity to a humanist tradition as an "inside-out view" (Reedy, 2009, p.92) of a person – his inner dialogue. Identity is linked with action that can be lead to "an existential quest for an authentic self and . . . existentialist hero" (Reedy, 2009, p.104). Reedy progresses the discussion about identity being a matter of narrative claims, to specific action and achievement, by which managers can distinguish themselves from others. He (along with other writers, such as Atkinson, 2009) terms this 'narrative accomplishment' as the 'hero' must have performed something to be able to talk about it. This is relevant as the data in this project include observations of the participants' actions in performing their role, not just their self-claims that would be revealed in an interview.

An important debate about manager identity is the notion of 'the emergent manager' and this seeks to answer the dilemma about when does an individual become a manager. Watson and Harris (1999, p.17) suggest there is "no obvious point at which one suddenly 'becomes' a manager" and credit the use of the word emergence to Chia (1996). Although the writers consider "work histories" (Watson & Harris, 1999, p.34), and "connections between the background they came from" (Watson & Harris, 1999, p.54), they do not explore the viewpoint of specific stages in the participant's backgrounds that relate to the performance of a manager role. They recognised that for some "their current post doesn't seem to represent a radical break with their professional careers" (Watson & Harris, 1999, p.48). In other words, they did not perceive themselves to be managers and may continue to perform tasks that they did previously. In addition, they (in line with Hill, 1992) do not reveal the ages of their participants, and it would be interesting to examine my assumption that they come from

the Baby Boomer generation given the dates of publication, compared with the generation X managers in my project.

Whilst Watson (2001a) does address the topic of personal identity consistently in his work, the analysis is not developed beyond a recognition that identity is "*emergent*: it is part of the continuous process through which we come to terms with our changing world through a process of shaping our 'selves'" (Watson, 2001a, p.59). Characteristics of, or stages in emergence are not explored. However, in a separate publication he does raises the fascinating idea that individuals "do some of their 'management learning' well before they even think of taking on the occupational role of a manager" (Watson, 2001b, p.222). This highlights the importance of earlier life experiences, that privilege "*anticipatory socialization"*, (Pahl & Pahl, 1972, p.20-22). Such anticipation helps individuals to recognise the relevance of prior experiences in their current role. As will be shown in chapter six, conceptions of emerging and becoming do not mean that formers selves are discarded, rather they add to the fine-grained detail through which an individual is identified. Individuals draw on former experiences eclectically and perhaps not always consciously to present themselves as managers a view supported by the view that "frontline managers are bricoleurs who use diverse materials to construct identity" (Down & Reveley, 2009, p.394). This not only echoes the views of Carruthers & Uzzi (2000) about eclectic choices in occupational identity discussed, but suggests a link to the metaphor of becoming and ongoing formation.

The activities and practices in which individuals engage as a manager can influence their sense of self, although Whetton and Godfrey (1998, p143) propose that "one role of a manager might be to somehow facilitate the process of creative synthesis by bringing opposing identities together". Do individuals adopt multiple identities (Gergen, 1971; Bourdieu, 1984; Baruch & Cohen, 2007) and find an accommodation between their occupational or managerial identities? To what extent is the "shifting concept of the self" (Burkitt, 1994, p.8) an influence an individual becoming a first-line manager? These issues are important given the nature of management studies that have sought to examine the extent to which working in an organisation shapes and regulates the identity of staff (Alvesson & Willmott, 2002).

Multiple identities and self-presentation

The Chilean poet, born Neftalí Ricardo Reyes Basoalto (1904 –1973), presented himself to the world as Pablo Neruda. He later changed his legal name to Neruda to reflect the influence on his work of the earlier Czech poet Jan Neruda (1834 –1891). He was not alone

in literary circles in changing his identity to alter how he wished others to see him. In the poem "We are many" (Neruda, 1968), he illustrates succinctly the challenges of self-image and identity choice, personal presentation and situation:

De tantos hombres que soy, que somos,	Of the many men who I am, who we are,
no puedo encontrar a ninguno:	I cannot settle on a single one:
se me pierden bajo la ropa,	They are lost to me under the cover of clothing,
se fueron a otra ciudad.	They have departed for another city.

Poets are not the only individuals who make choices over differing presentations of the self. Ybema et al., (2009a, p.306) suggest "that 'identity' is a matter of claims, not character; persona, not personality; and presentation, not self". Perhaps identity is constructed through personal narrative and social interaction, reflecting the view of Eakin (2005, p.305) "that what we are is a story of some kind". This could expose threats to the integrity of the story by falsification or embellishment of the story. Perhaps some individuals edit their past to articulate a preferred self-view that may not be matched by their lived reality, a form of impression management or "communicated identity" (Balmer & Greyser, 2002, p.74).

Ricoeur (1992) regards competing views of identity "in terms of a distinction between idem (same) and ipse (self) identities" (Mallett & Wapshott, 2012, p.20). The opposing attributes of these poles are shown in table 3.7. There is constancy throughout life (idem identity) as each individual is a unique actor in his 'story'. Each is recognised consistently by others even though they may make different presentations through their actions, the notion of "substitution without semantic loss" (Sone, 2005, p.7); a person may be a criminal, but is still a loving father. Ricoeur suggests that idem identity is both continuous and durable.

Table 3.7 Ricoeur's idem and ipse identity

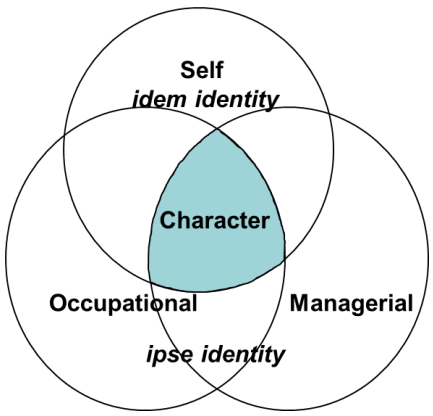
Idem	Ipse
Uniqueness	Plurality
Extreme resemblance	Difference
Uninterrupted continuity	Discontinuity
Permanence over time	Diversity

At the same time, Ricoeur recognises that self-representation will change over time due to the exercise of agency, which can reveal plural identities or difference (ipse identity, also related to the notion of différance (Derrida, 2002) referred to earlier in this chapter) and fragmentation through multiple interpretations.

Self presentation can be resolved through the degree of overlap between idem and ipse identity with the notions of "character" and "self constancy" (Ricoeur, 1991, p.75.). He recognises the degree of coincidence between them as one's character, defined as "a set of lasting dispositions by which a person is recognized" (Ricoeur, 1992, p.121). Character has two elements; habits which are developed through experience which relates to Mezirow's (1997, p.5) "*frame of reference*"; and identification, the degree to which an individual associates himself with others. He refers to the degree of separation between the two as self constancy, which Sparrowe (2005, p.427) suggests is how a person is viewed as "the same subject within the multiplicity of events in a narrated life". Put simply, ipse identity permits identity possibilities, but is regulated by the idem which assumes control. One does not stray for too long from the idem due to "pressures of internal self-reflection and potentially competing and contradictory external engagements and influences" (Mallett & Wapshott, 2012, p.21).

The discussion thus far on identity has introduced the idea that by the time an individual assumes a first-line manager role he may struggle with three versions of the self, an inner 'true' self, an occupational self and a managerial self. So how does an individual cope with managing different presentations of self? Roccas and Brewer (2002) suggest that there are four strategies to manage multiple identities. Firstly, through 'intersection' and adopting taking an identity by analysing the degree of overlap between the identities. The writers suggest that this strategy can only work when dealing with two identities, perhaps echoing Ricoeur's (1991) duality of idem and ipse, although the consequences for more are not discussed. I propose that overlap can exist with more than two identities, shown as a Venn diagram in Figure 3.3, which locates the Ricoeurian concept of character at the intersection.

Figure 3.3 Presenting identity at 'the intersection'



There is little need to consider a position where the identities do not overlap as the notion of self constancy impels a return to character reminiscent of Gergen et al.'s (2004) notion of centripetal forces.

A second strategy is dominance through which all but the selected identity are subordinated. This may lead to internal consistency for the individual, yet the identity adopted may not be universally accepted as appropriate by others. A lack of self-awareness may lead an individual to embrace one identity and this may limit the level of engagement by other group members, especially when trying to subordinate a multiphrenic self (Firat et al., 1994). An individual sees his membership of multiple groups as unproblematic.

Thirdly, compartmentalization permits an individual to select a context-specific identity and this echoes ideas of 'what hat shall I wear today?' (Stein, 2009). Compartmentalisation is, in many ways a development of Goffman's (1958) idea of 'dramaturgical metaphor', yet Roccas and Brewer (2002) do not cite his work. Goffman (1959) explored the idea that individuals enact a part as in a stage play. "All the world is not, of course, a stage, but the crucial ways in which it isn't are not easy to specify" (Goffman, 1959, p.78). He recognises that identity is subject to significant control as individuals may sustain a standard of behaviour that is not consistent with his values just in case there is "an unseen audience . . . who will punish deviations from these standards" (Goffman, 1959, p.87). He distinguishes appearance, such as dress from manner, the way we behave, although intriguingly, our behaviour may not reveal who we truly are as "behaviour is better viewed as a sign of self in practice, not as a sign of self in essence" (Holland et al., 1998, p.31). The self-presentation is perhaps regulated by combining "dramaturgical performance with self-narration" (Ybema et al., 2009a, p.300). Perhaps individuals find an accommodation in managing multiple identities which is not problematic to them: Thoits (1983, p.183) suggested that it does "not necessarily result in role strain or role conflict".

Finally, Roccas and Brewer (2002, p.91) suggest a strategy of merger where "social identity is the sum of one's combined group identifications . . . [which] transcends single categorical divisions between people"; subdivisions are not recognised.

In sum, individuals have a number of possibilities for how they accommodate the three identities in this study, but choices are regulated by the idem identity. They need to behave 'in character' for personal ontological security and to avoid being viewed by others against

Salinger's (1951) vernacular notion of being 'phoney', or out of character. Continual changes in self-presentation would not be deemed attributes of an authentic person.

3.4 Learning and identity

The previous sections in this chapter have considered learning in different forms and suggested a link between learning and identity. I shall now explore links between understandings of learning and identity, as both had an importance to the study of themes that emerged from the data.

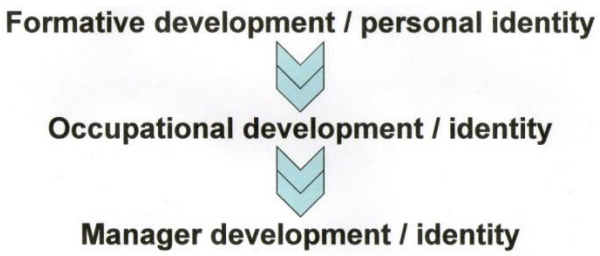
The conflation of identity and learning is argued by some writers to be a single construct. For example, Billett and Somerville (2004, p.315) suggest that "a close yet reciprocal interdependent relationship exists between individuals' sense of self and identity and their learning." Lave (1996, p.96) supports this idea by proposing that learning "is not just the acquisition of memories, habits, and skills, but the formation of identity". Earlier, Lave and Wenger (1991, p.115) argued that "learning and a sense of identity are inseparable: they are aspects of the same phenomenon". They present as a "fact that learning involves the construction of identities" (Lave & Wenger, 1991, p.53), yet do not provide a justification for this broad assertion ("fact"). In addition, it is disappointing that they do not explore processes or stages in identity development. However, they do explain how the process of identity change occurs through legitimate peripheral participation, and rely on the vignettes of five apprentices to illustrate the point self-evidently. However, I do not believe this provides adequate justification, as they do not explore the passage of an individual from peripheral participation through to mastery.

Hodkinson and Macleod (2010, p.176), posit that when individuals learn, which they describe as sense making, they develop embodied practices through which they additionally "*construct themselves*" (emphasis added). This theme is taken up by a number of writers who submit that individual identity changes through the process of learning, particularly so when learning to become a manager. Elkjaer (1999, p.81), suggests that "the learning process involves learning an identity" which implies leaving behind an old identity. Hill, (1992) concludes that individuals experience a fundamental change in identity during their transition to the role of a manager; the process of learning transformation leads to the adoption of a new identity. In her study, she confirms this shift by suggesting that in times of crisis when managers experience discomfort, they "would retreat into the comfort of their old identities" (Hill, 1992, p.91), confirming her view that there are different identities. This may also suggest that they revert to doing work that they previously enjoyed, but which ought to

be done by others. More recently, Warhurst (2011a) concluded that when studying towards an MBA qualification, individuals changed their identity.

Analysis of the data challenges these views, which is supported by Patterson (2014, p.6) who suggests that when individuals become first-line managers they "do not shed their professional identities [yet] . . . there is a sense of needing to re-orientate having moved to a different territory". What is clear from data analysis is that the identity of each participant was formed through a combination of people and context influences and the exercise of their personal agency in three stages of development. Firstly, their formative development; who they were before they started work and their personal identity; secondly, their occupational development at work before they became a manager through the development of an occupational identity; and finally their manager development from what they learned through engagement in different activities to become a first-line manager. This is shown in figure 3.4.

Figure 3.4 Three stages of development



Summary of learning and identity

Figure 3.2 above summarised the critical analysis of learning as a two dimensional model of four quadrants. Figure 3.4 illustrates the development to reflect the link to identity. It shows three stages of identity development applying across the four quadrants. There is no clear link between the stages in identity development and learning in different orientations or using different metaphors, as each is subject to a range of influences, both positive and negative which will now be examined.

3.5 Controls in and influences on learning and identity

Learning "does not occur in a vacuum" (Merriam & Caffarella, 1999, p.22), but "is shaped by the context, culture, and tools in the learning situation" (Hansman, 2001, p.45). In the same way, "individual identity is shaped by a reciprocal interaction with society" (McDonald, 2013,

p.159). Context and culture will include other individuals and relationships, issues that have been identified by Sambrook and Stewart (2000) as having an influence on learning. In this section, I shall identify people and context influences on learning to become a first-line manager.

People influences

Many individuals recognise the contribution to their development of particular people. These have been referred to as "significant influencers" (Lake & Eastwood, 2004) in a study of early adolescents; "salient others" (Borich, 1999) in teacher development; and in a project environment to discover potential leaders as "significant individuals". Whatever the label, they are described as an "important influence on a person" (Toor & Ofori, 2008, p.214). The use of such terms has had limited examination through systematic reviews in the manager literature, although 'people influencers' has had some coverage through role modelling, although this field would benefit from further theorising (Warhurst, 2011b). In a study of the emergence of leaders, Toor and Ofori, (2008) point to the relevance of both significant people and significant experiences, the result of interactions with others, that help to shape development and the formation of a self.

Parents

It is unsurprising that parents who are "part of the realm external to the knower" (Phillips, 1995, p.9) play a fundamental role in the development of a person and are therefore significant individuals. In the first few years of life, they are providers of food and care and are the main contact a child has with others. The role of parents "in laying firm foundations during the early years" (Kathard, 2006, p.82) shapes future behaviours as infants observe and emulate. Parents' values and their practices can become standards for behaviour for their offspring (Singh et al., 2006).

Parents can also play a part in influencing career choices (Watson & Harris, 1999). Volman & ten Dam, (2007, p.846) suggest that background can place limits on aspiration as "'our kind of people cannot do/do not do/do not want to do that'". Colley et al., (2003) found that young women whose parents worked in caring occupations also chose that as a career route; engineering students came from skilled manual workers. Eteläpelto and Saarinen (2006) found that teachers' children often became teachers themselves'. In contrast, Hodkinson et al., (2007) identified parents who had higher aspirations (social mobility) for their children than their own lives – miners did not want their children to go down the mine. Raeder and Grote, (2010) showed that some parents can exert a controlling interest by

making choices for their children, although not all subjects in their study acquiesced. Interestingly, an influence on career can also influence a disposition to learning. Jenkins (1996) suggest that the more highly educated the parents, the greater their level of interest in their children's education.

Teachers

Teachers will also exert an influence as they spend significant periods with young people, arguably as much as parents do during the working week. Attachment theory (Ainsworth & Bowlby, 1991) suggests that the roots of interpersonal behaviour as an adult lie in the ties that are formed in early life, yet a systematic search of literature revealed that there has not been a study to examine the direct influence of teachers on managers. It is inconceivable that teachers do not act as significant a person as parents. The participants in this study identify teachers as instrumental in making them the managers they have become.

Studies in role modelling draw on two main areas of theorising, identification with others and modelling (Gibson, 2004). Identification refers to an individual's motivation to adopt characteristics of the role model - modified self-definition (based on studies of childhood – see for example Erickson, 1986); modelling concerns social learning (Bandura 1978, 1986), often through observation, adaptation and rejection of features of multiple role models (Gibson, 2003). Role modelling can take different forms. For example, Cheetham and Chivers (2001) suggest that it can occur at three levels:

> Synthesizing, through which individuals take an eclectic mix of attributes from others, seemingly by osmosis (identification)
> Emulating, deliberately copying behaviours (modelling), and
> Actualising, when an individual believes that he is enacting the behaviour as if he were the role model (arguably an extreme form of identification)

However, the influence of the role model can be constrained by the conditionality with which advice or observed behaviour is valued by the receiver. A learner may reflect on the behaviour of the model but be selective about which behaviours to adopt for himself. For example, a new manager may value the way a senior and more experienced colleague handles a difficult member of staff, but be less disposed to emulate obsequious behaviour by the senior in front of the chief executive. Role models can therefore have conflicting influences; role modelling can in consequence be fragmented (Bucher & Stelling, 1977).

In a positive, helpful sense, role models "are likely to serve as important antecedents of a leader's development" (Toor & Ofori, 2008, p.214). Learners will observe attributes that are germane to their own value systems for adoption. This is consistent with theories that link positive affectation to similarity (Gibson, 2003) – as individuals we are drawn to others who are 'like us' prompting a response of 'I can be like them'. However, although it has been argued that negative role models are inconsistent with behaviourist principles (Moses & Ritchie, 1976), they too can affect future behaviour, even as a way of developing a prevention strategy to avoid personal failure (Lockwood et al., 2004). An individual will 'subtract' behaviours from the role model to develop a romantic or idealised view of the self. Interestingly, Bucher and Stelling (1977) did suggest the influence of negative role models in the formation of a professional identity, a notion Gibson (2003) referred to as an "antimodel".

Context influences

The context within which an individual exists can also exert an influence on learning to become a manager, and this has been studied by a number of writers who have examined the tensions between structure and agency. The concept was developed by Giddens (1984, p.2) as structuration theory, in which he proposes a constructionist perspective through which to study human activities as "social practices ordered across space and time". Social theory had not considered such dimensions up to that point. It is considered a duality (Billett & Smith, 2006); the two are opposing yet mutually constitutive. 'Structure' includes embedded practices and rules imposed by others, such as family or work that can limit an individual's choice in action. Individuals are subject to these structural 'rules' as they existed even before an individual arrived as an infant (Archer, 2000). Structure should not be conceived as a rigid framework, but ""rules and resources" which are implemented in interaction" (Held & Thompson, 1989, p.3). It provides and regulates the social conditions through which individuals engage with others.

Amongst structural inhibitors to learning in a work context, Sambrook and Stewart (2000) found a number of influences: organisation culture, the accepted mode of working that includes self-protectionism and bureaucracy; senior manager commitment to learning and the level of their managerial skills; poor attitudes of colleagues, including resistance to change; and the levels of work volume and how it is organised. Yet curiously, they found that two of these factors, culture and senior manager commitment, if positive and supportive, can make a beneficial contribution to learning by providing a motivational incentive.

In contrast, 'agency' is one's own free will based on freedom and intentionality (Jackson, 2010). Emirbayer & Mische, (1998) propose a "chordal triad" (p.970) approach to agency; iteration, the use of previous experiences to sustain one's self-image; projection, to model future possibilities for behaviour that are consistent with an individual's psyche; and practical evaluation, committing to future behaviour in a specific context from a variety of possibilities. Individuals inhabit a reality composed of the past, the current and the future, which Emirbayer and Mische, (1998, p.1012) refer to as "relational pragmatics". Put simply, the writers take up Giddens' contribution that agency is a different way of looking at the world at different points in time. Leopold et al., (1999) simplify matters even further by suggesting that agency is nothing more than personal choice, circumstances or situations experienced, or chance (Leopold et al., 1999) which can expose "the (situated) ability to give direction to one's life" (Biesta et al., 2008, p.14).

Our free choice as individuals is then a moderated decision between the two dualities. The interlinks between structure and agency are discussed by Hodkinson et al., (2007, p.418) who suggest that "people are subject to structures even as they take agentic actions", which suggests that 'pure' agency may be an illusion. Perhaps all actions are subject to forms of moderation from prior experience. However, agency may influence structure. Mayer and Tuma (1987, p. 3–4) contribute further that "social forces thus not only 'trickle down' from social institutions to individuals' lives but also 'percolate up' from individuals' actions to modify existing social patterns". The concept of structure and agency illustrates a key difference between the natural sciences that study objects that are not capable of articulating a response and social sciences that study people, who are. This 'double hermeneutic' enables practice to inform theory and vice versa.

A culture for control

As soon as a worker enters into a contractual relationship of service, he or she is exposed to forms of control that regulate behaviour. This is the nature of an exchange of labour for a reward, usually money. In turn, this leads to forms of domination by managers, appointed by owners, which is shown by directing the knowledge and skills that are used by workers. With the advent of Taylorist work principles in the 1910s which sought to increase worker efficiency, workers became deskilled due to the division of labour, an idea that can be traced back to Smith (1776). In more recent times, these themes have been examined by Braverman (1974) who summarised them into three principles known as Labour Process Theory (LPT).

The first principle is "*dissociation of the labor process from the skills of the workers",* which means that the labour process is independent of the worker and instead depends "entirely upon the practices of management" (Braverman, 1974, p.113). The worker has no involvement in work processes; his involvement is restricted to performing tasks. The second principle, the "*separation of conception from execution*", clearly establishes the worker as one who merely follows specific instructions from managers; it is "their duty to follow unthinkingly and without comprehension of the underlying technical reasoning" (Braverman, 1974, p.118). With no opportunity to question practices, the worker becomes little more than a machine. The third principle makes explicit the assumptions contained in the first two by locating managers' monopoly over knowledge of the labour process "*to control each step of the labor process and its execution*" (Braverman, 1974, p.119). These three principles are widely used in research about contact and call centres (Coleman, 2011), as the use of technology permits a 'panopticon' gaze as "a control device habitually utilised by management" (Bain & Taylor, 2000, p.4). Interestingly, contact centres have been metonymically referred to as "psychic prison" (Morgan, 1997, p.666), which reflects the 'sweatshop' perception discussed in the introduction and links back to the discussion of this concept by Morgan (1997) view about organisations generally. Arguably this use of technology is a major departure from its initial purpose of being a device to manage efficiently increasing amounts of data.

Braverman's LPT has been criticised for being focused on a limited period in history, but the central tenets of Braverman's ideas have been taken up in more contemporary thinking. Sewell, (1998) is credited with introducing the notion of 'chimerical control' into studies of contact centres. This form of control augments existing LPT management practices through, "the constant and supportive interaction of electronic surveillance and the peer group scrutiny" (Sewell, 1998, p. 422). The use of the adjective chimerical is a convenient trope to convey two notions; firstly that control may be imaginary and therefore not real, or at least may not be perceived consistently by workers, and secondly, borrowing the use of the word from practice in the field of biology that control operates on two dimensions. In the case of contact centres, it is vertical control exercised by managers and applied horizontally amongst peers and co-workers. The vertical control can operate in two ways, most obviously through the use of technology, which can record calls waiting, calls handled, length of call and so on, and observationally by managers. Examples of horizontal control include pressure to conform to standard operating procedures and consistency in treatment of staff.

More recently, and as response to lack of specific focus in the literature about the ways in which an organisation might seek to influence, control and regulate identity, Alvesson and

Willmott (2002, pp.629–632) propose a preliminary set of nine "specific means, targets and media of control", presented in table 3.8. This is a useful framework as it tidies the various control elements that I have already explored into a schema, such as job descriptions, person specifications, corporate values and working culture. Alvesson and Willmott (2002) do, however, recognise that personal agency offers choice to employees over whether to accept or reject such targets. What their template does not consider is the strength of the organisational attachment, as this has been shown to influence the degree to which employees cooperate with the espoused behaviours and values (Dukerich et al., 2002).

Table 3.8 Dimensions of organizational regulation, (based on Alvesson and Willmott, 2002)

Means of control	As evidenced by
Defining the person directly	The use of labels for job titles
Defining a person by defining others	a grouping of work characteristics, such as 'team worker', 'conscientious'
Providing a specific vocabulary of motives	shifting the discourse away from an instrumental approach to work towards a values approach to work, such as hard-working or personally rewarding
Explicating morals and values	policy statements, behaviours and corporate values
Knowledge and skills	the provision of a corporate curriculum of formal learning interventions
Group categorization and affiliation	the degree to which there is an 'us and them' culture
Hierarchical location	where individuals sit 'in the pecking order' both formally in the structure and the symbols of position
Establishing and clarifying a distinct set of rules of the game	'the way things are done here' through which 'non-players' are excluded
Defining the context	clarifying the organization's context and its aims which encourages employees to adjust their behaviours to comply

A culture for becoming

Arguments suggesting the limitations of formal learning interventions are well rehearsed. It has long been recognised in the literature that the workplace can be a more powerful place to learn than a formal intervention (see for example Betts & Holden, 2003; Taylor & Furnham, 2005). The work environment has the potential to influence what and how individuals learn on the job. In the context of a contact centre, Van Dun et al. (2012, p.172) comment that the "learning environment is particularly critical. . . . . as they are constantly confronted with signals, but are unable to act upon them". From this a number of questions arise for City-Access. Does the organisation demonstrate 'learning disabilities' (Senge, 2006), that inhibit

the capability of individuals to explore the potential of their abilities? How effective is the dominant organisational culture at facilitating learning? How do practices and work routines enable individuals to develop and become managers?

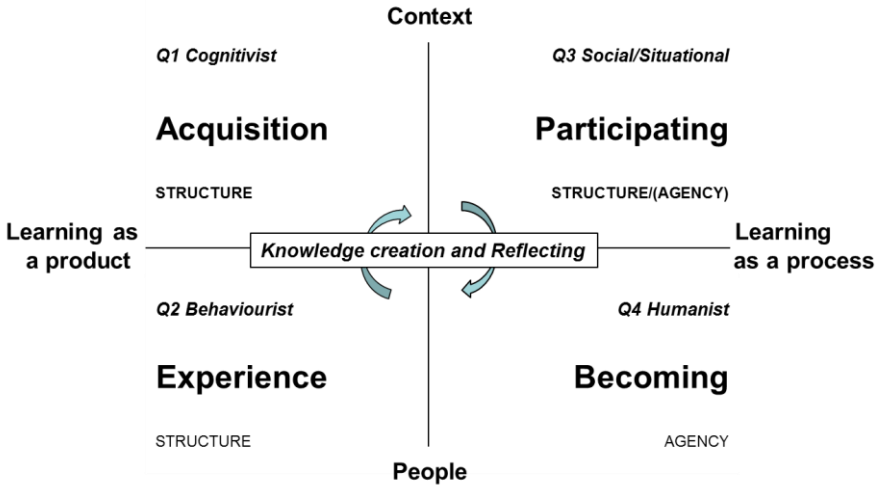
3.6 Synthesis of learning and identity theories

Whilst this is helpful to exercise a form of regulation over such a wide-ranging terrain, there remain too many elements to structure a clear analysis of the data. So, I shall return to my stated aim for this section, which was to examine "this crowded terrain to clarify themes" to facilitate data analysis. It is now apposite to summarise what has been learned and synthesize the concepts into a relevant analytical conceptual frame. I have surveyed four main orientations to the understanding of adult learning, six metaphors for learning and three stages of identity development to become a first-line manager, each of which makes a helpful contribution to the rich picture of exploring how an individual becomes a manager.

Individuals learn by absorbing facts and changing and developing their behaviour; they clarify understanding by developing frames of reference; they take personal responsibility for their growth and development (in varying degrees); and learn by interacting in different contexts and through diverse relationships. The use of metaphors for learning illuminates this exploration by acknowledging that individuals acquire new knowledge and skills, adapt their behaviour, participate in practice and evolve to become a manager. They do this whilst reflecting on practice and responding reflexively, and creating (building) new knowledge from their existing repertory. There are thus many routes to learning which are appropriate to achieve different outcomes. Individuals may or may not adopt these approaches consciously or consistently; there is no single way to learn. Individuals use their knowledge and skills of learning to develop their identity through the life course.

Figure 3.4 can be further extended to complete the discussion on learning as Figure 3.5. Its purpose is to conflate the three themes explored into a schema for data analysis: learning orientations and metaphors; people and contextual controls on learning; and learning as an outcome (noun) and as a process (verb). This tidies the territory of learning 'how' as a process with learning 'what'. This is not to privilege one binary over the other, but to recognise the contribution that different forms of learning make to an individual becoming a first-line manager.

Figure 3.5 Learning and controls

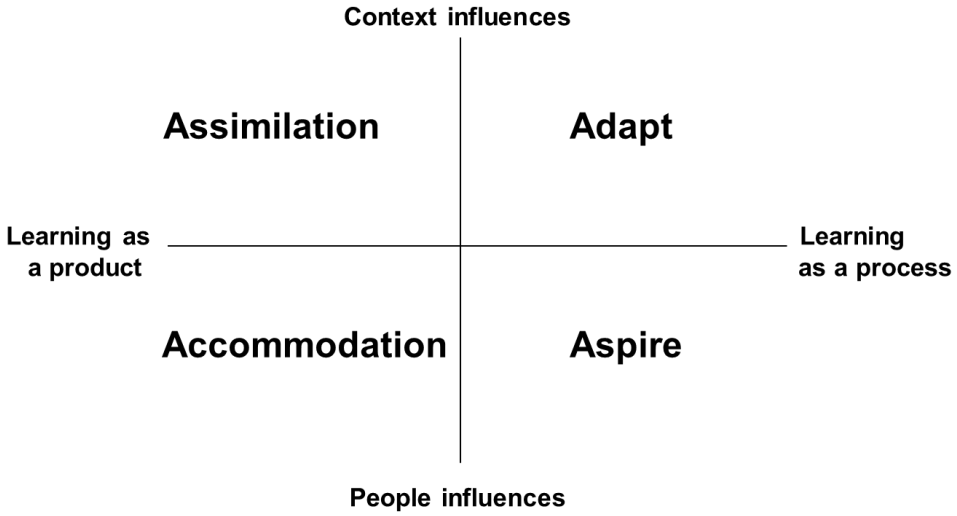


In Q1, individuals learn by acquiring the knowledge of the accepted protocols or standards that operate in a context and serve as structural controls. They assimilate these standards into their behaviour which are shown through, for example, house or school rules, and occupational benchmarks or organisational policies that guide decision making. These will also encompass performance management processes and organisational values statements, which are brought into working lives through job descriptions and competency statements. In Q2, individuals accommodate and conform to the views of significant people and develop values from them which are significant in their future experiences. For example, parents inculcate emotional control in behaviour and teachers reinforce the need to achieve. The need to adapt to dominant behavioural standards in a context is shown in Q3. Individuals adjust their ways of working and conform to group behaviours, norms and culture to gain acceptance. This is shown through giving and receiving support, the standard of dress and attending social events. They have some possibility to exercise their agency here, but it is limited by the prevailing norms. Finally, in Q4, individuals have the opportunity to exercise their agency and aspire to become the person they wish. Controls still exist, but these are more likely to be self-imposed, rather than directly controlled by either others or the context.

Whilst figure 3.5 presents a summary of the arguments developed thus far, it is overly complex and is too dense and messy to be usable as a conceptual framework. It is now appropriate to tidy this model for clarity. This is shown as figure 3.6 and uses nouns to relate to learning as a product and verbs for learning as a process. The acquisition of knowledge and skills that are subject to structural influences leads individuals to an *assimilation* of

standards that are adopted into practice. Experiences of being influenced by others leads to an *accommodation* of their values and practices to which individuals conform. In participating with others, individuals *adapt* to group norms, as they feel a need to be accepted by others. Finally, becoming is regulated by the degree of freedom an individual has to *aspire* to life goals and how confident he is to exercise personal agency. This conceptual framework is now presented as the model to structure the analysis of data.

Figure 3.6 Dimensions of learning to be a first-line manager



3.7 Chapter summary

In this chapter I have provided a definition of learning relevant to this project and have explored orientations to and metaphors for learning. Learning has been shown to be indistinguishable from identity, although I disagree with the view that learning changes identity in a way that excludes previous versions of the self. Rather, I see the potential for influences on becoming from both people and the context have been identified and the resolution of this critical analysis is presented as a conceptual framework to explore the richness of the data in chapter six. It has analysed the literature relevant to progress understanding of research objectives two, three and four shown in chapter one:

2. Identify how individuals learn to become a first-line manager
3. Discover influences that affect learning to become a first-line manager
4. Examine links between learning and identity

Becoming a first-line manager uses four modes of learning which support the development of evolving identities. Both learning and identity are subject to structural controls in a range of contexts, and to the behaviour and values of significant people. The following chapter will locate the research context for the study which will be used to explore the value of this conceptual framework.

CHAPTER FOUR CITY-ACCESS – A CONTACT CENTRE

4.1 Introduction

In this chapter I shall introduce the research context and justify the importance of exploring how individuals become a first-line manager in the domain of a contact centre. I will position City-Access within this occupational sector through a consideration of the different classifications of contact centre and the kinds of service they provide. A brief account of the development of City-Access will be given before explaining the nature of the first-line manager role in this context. I will conclude the chapter by evaluating both the provision of learning opportunities generally, to illustrate the learning culture, and the provision that supports an individual becoming a first-line manager. This will include an evaluation of the nature of the working environment conditions, affordances (Gibson, 1977; Billett, 2001), described as those factors that have the potential to support or inhibit learning.

Contact centres are stimulating arenas to study as they are a relatively new and growing industry sector in the public sector and moving towards maturity in the private sector. Some fifteen years ago, they were described as a "fledgling . . . industry" (Crome, 1998, p.137). Whilst they are of increasing interest to the academic community, much of that interest centres on the use of information technologies; process services and marketing (Hughes, 2006), management of staff issues (Robinson & Morley, 2006; Soing et al., 2006), and performance management (Higgs, 2004; Mahesh & Kasturi, 2006). Contact centres also generate interest as they are high-intensity work environments. Yet unlike others, for example an accident and emergency facility in a hospital, they are often characterised by low-level work complexity and low-level skill needs, as work is driven and controlled by technology. Contact centres are also associated with high staff turnover and staff commitment is generally low (Malhotra & Mukherjee, 2004; Ibrahim, 2012). As will be shown, there have been some studies of learning in contact centres, but this has been focused on call advisers, not managers. Learning to become a manager in this specific context is not researched in the literature.

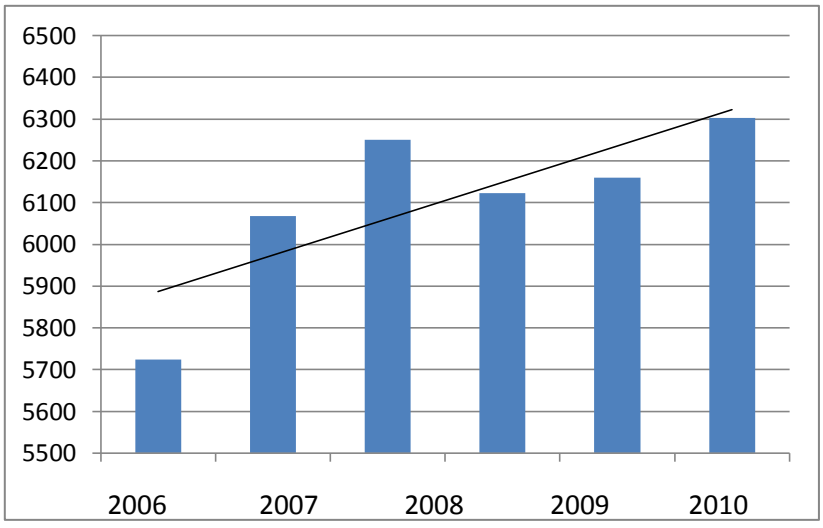
4.2 Contact centres

A contact centre has been defined as "a dedicated operation in which computer-utilising employees receive inbound, or make outbound, telephone calls" (Taylor & Bain, 1999, p.101). Whilst organisations have used telephony to communicate with customers since the

introduction of the telephone in the late nineteenth century (BT archives online, http://www.britishtelephones.com/histuk.htm), call centres, the initial title that was adopted, developed after the introduction of automatic call distribution by the US firm Rockwell in 1973 (http://www.callcentrehelper.com/the-history-of-the-call-centre-15085.htm). "The defining feature of the call centre is the Automatic Call Distribution (ACD) system, which both queues and routes customer calls automatically to the first available operative ('agent') in a given centre" (Hastings, 2011, p.99). This may be an interesting marketing ploy by Rockwell, as there appear to be examples of call distribution technology in the 1950s (www.callcentre helper.com/the-history-of-the-call-centre-15085.htm). More recently, the expression contact centre "has become the industry standard" (CfA business skills @ work, 2012., p.8) and this term will be adopted for the rest of the thesis.

The practice of using contact centres is a growing area of operations management as they "have become established as the primary method of organisations to manage customers" (Keating, 2008, p.1). A report by Market & Customer Insight Ltd into the operation of contact centres in the UK reported the growth in the number of UK contact centres to 2011 (www.mbdltd.co.uk /Press-Release/Call-Centres.htm). This is shown in table 4.1 with a growth trend line added, which demonstrates a significant increase from 2006. It shows a rise of over 10 per cent in numbers of centres. A separate report estimated that by December 2011 contact centres employed 650,500 staff (CfA business skills @ work, 2012). In employing around 2 per cent of the working population of the UK, contact centres have

Table 4.1 Number of UK contact centres 2006-2011



become significant places of work. The value of the contact centre market is expected to grow at a compound annual rate of 3% to contribute €16 billion to the UK economy by 2017 (http:// www.mycustomer. co/topic/ customer- experience /public-sector-and-retail-driving-growth-contact-centre-outsourcing /127414, 2011). The contact centre labour market is two-thirds of the size of the UK's information and communication sector at February 2013 (662,000, www.ons.gov.uk), yet that sector has attracted much greater interest from the academic community. There are more than twice the number of 'hits' on Google Scholar for ICT than contact centres (http://scholar. google.co.uk/scholar 3 June 2013).

Whilst contact centres are often thought of as being a facility in the private sector domain, McElhinney and Proctor (2005, p.193) identified the increasingly widespread practice of local authorities "introducing of (sic) call centres into the heart of their operations". The UK's Central Office of Information (2008, p.6) suggests that contact centres are "an important way for customers to get in touch with government", and perhaps surprisingly, go further to propose that they are "first and foremost a marketing channel and should be treated as such". The lexicon of business continues to be adopted by the public sector and this can give rise to frustrations by staff who face challenges to their ethos of service as their motivation to work. Figure 4.1 (COI, 2008, p.13) illustrates the principles upon which public sector contact centres should be based to "*deliver many benefits including better service, greater effectiveness and cost savings* (COI, 2008, p.14, emphasis in the original). It is a simple expression to illustrate a process of providing a service to communities served.

Figure 4.1 Contact centres in Government – a fundamental ethos

Working in contact centres has been characterised by and perceived as a “sweatshop or dark satanic mill” (Weinkopf, 2002, p. 456), due to assumptions that have been made about the nature of the work undertaken. There is a view that work activities in such contexts is of a routine nature, regimented by controlling technologies; people are treated as a resource to be managed like equipment and inventory (Price, 2011). Call advisers are monitored through a ‘panoptic gaze’, reflecting the discussion in section 2.2 in the previous chapter. This can give an impression that management work in contact centres is not very sophisticated. Monitoring and work allocation is arguably managed centrally or through the use of technology routines. Whether the work is sophisticated or not, individuals who work in contact centres need to learn how to perform successfully their job role.

Classification of contact centres

As contact centres operate in different forms, it is helpful to consider the various types that exist, shown in table 4.2 (COI, 2008, p.11). As will be shown below, City-Access is an example of a multi-category operation

Table 4.2 Classification of contact centres

Category of service	Example of service	
Inbound	Receiving calls	or both
Outbound	Making calls	
Simple	Leaflet ordering	
Complex	Advice and counselling	
Internal / In-house	For fellow employees	or a combination
External / Outsourced	For a range of differing customers	
High volume	Information giving	
Low volume		

There is considerable variety therefore in the types of centre that operate within the broad grouping of contact centre. Given the discussion in the previous chapter about the lack of a single view about manager activities, each centre will need to be considered individually.

4.3 City-Access - organisation background

The research context was an organisation that is a partnership between a public sector local authority and a private sector telecommunications company. City-Access was created in 2001 as the outsourced contact centre of one local authority based in the north of England. Its specific remit at inception was to make significant improvements to the provision of local authority services. Initially only a narrow range of services were provided, but were extended

over time to include a wide range of information and communications technology and people management services. At the same time, the company had grown by adding clients throughout UK and operated by either assuming total responsibility for the delivery of a specific service, or through a partnership in shared services. The company's vision statement referred to its focus on leadership and innovation in both the contact centre sector and in its service provision to client organisations. It signalled its interest in longer-term sustainability as a viable business with its stated aim of wishing to be recognised as an employer of choice. This strategy was designed to encourage high employee retention to retain the knowledge, skills and experience of talented employees to deliver high quality services (Torrington et al., 2011).

City-Access provided services to the community through a range of different communication channels:

- Telephony
- Email
- Online / web-based
- SMS text messaging
- Face to face
- Kiosks / street pods

As the focus of this thesis is on first-line managers of call advisors who engage with customers through technology, management work associated with the final two channels in the list above was excluded from further analysis.

The company had a city centre location and employs over 1,300 people. Being based in a city centre increased accommodation costs against comparable out of town 'industrial parks', but was valued by staff who had ready access to lunchtime and end-of-day amenities. The office building was situated in a very convenient location, right outside a row of bus stops, a two minute walk from the main bus depot and less than five minutes from both local and national rail network. Affordable car parking, as in most city centres was around ten minutes' walk away.

City-Access had received a number of accreditations to recognise the quality of its work. These included:

- Investors in People Gold
- Contact Centre Association (CCA) Global Standard V5
- Customer First Award

- ISO 9001 Quality Management
- ISO 14001 Environmental Standard
- ISO 27001 Information Security Systems

Such a broad range of accolades might suggest at the level of face validity that the company displayed characteristics of excellence across a number of different areas. However, such awards can be criticised for disguising excellence in practice, as there may be no link between matching an award's criteria and the interests of all stakeholders. For example, in 2013, the much-criticised North Staffordshire NHS Trust proudly claimed the quality management standard ISO 9001, yet had a mortality rate amongst the highest in the UK. The Royal Bank of Scotland is keen for customers to see its award Investors in People Gold, which recognises its personal development philosophy, but this did not stop some highly-skilled and experienced staff acting unethically in trading. Nevertheless, such a broad level of awards for City-Access suggested a company that was keen to promote a leader position in the industry amongst its peers.

City-Access exhibited a number of the eight characteristics of the classification of contact centres shown in section 4.2, and this is illustrated in table 4.3.

Table 4.3 City-Access provision of services

Category of service	Specific examples of service
Inbound	Queries about the collection of refuse
Outbound	A morning call to a vulnerable person living under 'supported living' to check they are awake and well.
Simple	To collect a parking fine.
Complex	To decide whether a child needs police protection or the services of a social worker
Internal / In-house	As an advice centre to staff
External / Outsourced	Dealing with client of contracted organisations.
High volume	Answering queries about service levels during an employee strike.
Low volume	Listening to the case of a homeless person who is in desperate need of help.

Given such a broad area of operation, City-Access can be considered a very sophisticated operator of technology-related services. To deal with this complexity, the services that it provided were clustered into specific topic areas, organised in work teams that were spread over the four floors that City-Access occupied in its city centre location. For example, the

second floor was allocated to care for vulnerable adults and children and all staff and visitors to the section have to be screened through the UK Criminal Records Bureau, (now renamed as the Disclosure and Barring Service).

Call advisers sat at an allocated desk, in an array that has become known as a 'pizza slice' due to the shape of the working area. First-line managers, at the direction of the Operations Manager, sat at the head of the row, although there was one exception to this. The least experienced first-line manager Patricia was directed to sit in the middle of the row amongst her team as she was in the direct line of sight of the Operations Manager. Patricia recognised the opportunity this gave her manager to keep her under constant *surveillance.*

Image 4.1 is a photograph of the actual layout of the office. I was not permitted to take my own photographs, but was given this photograph that had been approved by senior management for promotional purposes. The lack of freedom did not restrict the research. As can be seen, it shows a bright, airy work environment with every desk occupied. There is natural daylight from two sides of the building for three of the four floors. In the lower ground floor, there is no natural daylight and this causes some resentment from both advisers and first-line managers who work there. Given the numbers of staff on all floors who talk continuously, noise levels were low as the good quality carpet, acoustic ceiling panels and the material that lines the screens to each work area dampened the sound so that it did not distract from attention to customer calls.

Image 4.1 Office layout in City-Access

Work was organised on a shift pattern, with all services being available to customers on a 24/7/365 basis, including Christmas Day. Indeed, one of the stories that typified the collegiate and friendly culture of the organisation by embedding "the present in its organisational history" (Johnson et al., 2008, p198), concerned a historical call from an older, lonely customer on Christmas Day. He telephoned to enquire how to make gravy for his Christmas lunch and all the staff working on that day gave advice, not just on making gravy, but on a wide range of culinary matters. The call concluded with a rendition of Christmas carols.

4.4 Learning provision in Contact Centres and in City-Access

Research into learning practice in contact centres, is substantially focused on learning for call handlers. As far back as the year 2000, Houlihan (2000) identified that the regimented and controlling environment of a contact centre provided few opportunities for "space" to consider learning. This can lead to staff feeling disengaged, and can lead to some unintended consequences which she describes as "workarounds", or work avoidance. As an example, such behaviour can also include the deliberate ending of a difficult call without customer agreement. Learning, she suggests seems to occur through the sharing of stories and this would prevent consistency in approaches which ultimately can compromise quality, if less effective practice can be shared. Crouch (2006, p.435) identified that whilst some contexts embrace workplace learning and communities of practice, there is a dominance of places that "remain embedded in an industrial learning discourse". This is typified by advisers needing to learn scripts and follow prepared routines online. Field (2008) pursues the idea that learning occurs informally and is linked with the concept of "emotional labour" defined by Hochschild, 1983, p.7) as "the management of feeling to create a publicly observable facial and bodily display". Call advisers 'act out' a role through working to a script. Perhaps due to the potential tedium of this work, advisers draw closely on Goleman's emotional intelligence list introduced in table 2.6, such as adaptability, self-control, emotional awareness and achievement drive to present a standardised image to customers. This is illustrated by the view that "faking it (is') . . . just an acquired and a practised skill and experience" (Field, 2008, p.9), so that advisers "more belong to the organisation and less to the self" (Hochschild, 1983, p.198).

This instrumental approach to learning typifies most organisational approaches to learning. The practice of Human Resource Development (HRD) professionals is dominated by a view that seeks to establish clear links from the sum of individual experiences to organisationally

valued performance (CIPD, 2003; Mabey, 2005). Literature mainly focuses on a single perspective, the employer, who provides, commissions or supports training (and occasionally education) almost as a commodity to homogeneous groups so that individual performance can increase. This ignores the fact that members of staff are heterogeneous, an issue that has only had limited attention in the HRD literature (March, 1991; Marengo & Tordjman, 1996; Tordjman, 2007). The delivery of training is often treated systemically. Buckley & Caple (2009) discuss a mechanistic four-part process for training that possibly has its roots in US military work in the early part of the nineteenth century. This framework is well-cited, if not always well-used by practitioners to achieve job performance. Harrison (2009) considers the links between HRD activities and business strategy (vertical integration) and the alignment of HRD with other people management processes, such as recruitment, pay and employment conditions (horizontal integration). Neither of these approaches to integration considers the aspirations and motivations of individuals to develop, nor their reward for participation in training. This gives rise to two issues. Firstly, a naïve assumption that learning solely for performance is a good thing *per se*, and a second cynical view, certainly from a learner's perspective, that there is an implied threat arising from a failure to develop knowledge, skills and attitudes. Inability to perform a job role by using developed knowledge and skills could result in dismissal – a logical step from viewing HRD as part of the performance management system that includes a disciplinary procedure. This is consistent with the 'hard' approach to human resource management (Storey, 1989) and reinforces power and control by "managers exercising 'sovereign' disciplinary power" (Valentin, 2006, p.21). It follows that the discourse of developing individuals is largely viewed as an instrumental process to support performance outputs and reinforces organisational power and control exercised by senior managers. If only reality were predictable, the formulaic offerings from HRD staff could be justified.

With the emergence of writings in critical HRD (Valentin, 2006; Rigg, Stewart & Trehan, 2007), there is growing disillusionment with linking learning with performance and measurement. Yeo (2003, p.71) recognises that "because the process of learning is volatile and that knowledge acquisition occurs at several levels, any attempt to measure intangibles can be problematic", although he only considers one form of learning. Further, the assumption that there is a causal link between HRD activity and organisational performance is problematic. Individual agency will result in different values, expectations and motivations towards work, and employers ought not therefore to expect consistent behaviour in patterned ways. In terms of development, each will have unique experiences of prior learning and a distinct capacity to develop, discrete threshold levels of competence, and singular opportunities to consolidate any new knowledge and skills and recreate knowledge from

other contexts. This is recognised by Casey (1999, p.15) who states that "people learn diversely and indelibly through their experiences of work and workplaces".

The learning provision in City-Access was described by staff working as HRD practitioners as "limited". It is consistent with an instrumental approach, that was signalled in City-Access's 2011/12 annual report in a number of ways. City-Access claimed that it sought to "develop and release the full potential of our people at an individual, team and organisational level", yet learning was limited to the knowledge and skills for compliance to work protocols. The report further stated that the investment in staff development "has helped to consistently deliver improved productivity and engender constructive staff engagement". This may be suggestive of the same number of workers handling more work, a form of "sweating the assets" (Warhurst, 2013, p.37). In addition, staff retention was unusually high in City-Access for the contact centre sector, due in part due to a compensation strategy to pay staff in the upper quartile and partly due to the general economic environment. This minimised the costs associated with recruitment and selection. I was not permitted access to data to support this assertion for reasons of commercial sensitivity, but this did not affect the quality of data as the participants appeared content with their compensation package and spoke about being well-paid.

New call handlers undertook a standard range of induction courses to acquaint them with the organisation, its background and purpose, together with training to cover statutory responsibilities under Health and Safety legislation. Specific training on the technical use of the technology and the application routines was provided progressively. A new starter would learn about one service, for example refuse collection and will be supported by the first-line manager to handle live calls proficiently, before being introduced to learning how to handle other services. Ongoing learning needs were identified through the monthly performance reviews and feedback from call observations.

The development of behaviours to support job performance was delivered through a cultural training programme delivered over two days, which was allied to the corporate values. These values were expressed as a helpful acronym, but to retain the anonymity of the organisation I will merely comment that they include Respect and Recognition, and Integrity. For all forms of training that were provided, there was little evaluation of practice. Beyond limited reaction level measures taken at the conclusion of a learning event, the effectiveness of learning was not known, a practice common to many organisations (Han & Boulay, 2013). It appeared to suffice to City-Access's HRD staff that training had occurred. There was no consideration of outcomes or their quality, nor issues for continuing improvement in training

delivery. It is revealing characteristic of the environment that there was no concern for the relevance of learning, or how this might be applied back in the workplace.

4.5 First-line-manager role in City-Access

The CfA business @work survey (2012) reveals that five per cent of employees in contact centres act as supervisors or first-line-managers, which makes these workers a noteworthy part of the industry. City-Access refers to the first line manager role as a Team Leader. The more generic first-line manager title will be used in this thesis as it relates more closely to the title style used in the literature as noted in the previous chapter. An extensive literature search in Human Resource Development (HRD) has found no coverage of learning to become a manager in the context of a contact centre. This is significant given the highly distinctive nature of manager work in a contact centre.

In section 4.2, I questioned the sophistication of managers' work in contact centres. Indeed, my initial question to the CEO of City-Access was to ask him why he paid staff £28,000 to manage staff that are in turn managed by technology. His response was tantalisingly

Vignette 1 **A life in the day of Patricia in Adult and Children's Care. Longer, specialist calls.**
I met Patricia by chance outside the office at a kiosk, 30 minutes before she was due to start work. She bought a cup of tea and we entered the building together. She introduced me to the team, reminding them of her earlier conversation about my purpose and advised them to try and ignore me. She first checked how many emails had arrived, and then reviewed the cases on the 'handover' list from the overnight team, to discover whether there were any new cases that required urgent review. She has access to an approved mental health practitioners if there were queries for which she was not qualified to handle, such as the need for sectioning of an individual under mental health legislation.

Patricia reviewed management information data online and then talked with her team individually. On the observation day there were six members of staff on shift. She waited until her team members had finished a conversation before enquiring about their work tasks. Her tone of voice was supportive rather than inquisitorial and she thanked staff for their work. Patricia collected all the faxes that arrived to the floor and distributed them to the appropriate addressees. She did this at regular intervals during the day. The settings on her email enabled a newly arrived email to appear on her screen superimposed over whatever she is working on.

She took queries from her team members in a calm way, always listening before making her response, and thanking staff for their efforts regularly. They thanked her for help – there was lots of mutual respect here. She updated notes on case files and shared work experiences with a colleague who I later discovered is a personal friend. When the pair realised that they have been talking for some time, they visually check whether the Operations Manager had noticed the time they have been together and they quickly returned to their teams.

Patricia did not take a mid-morning break from work, but made herself a cup of tea and brought it back to her desk to carry on working. She commented about the behaviour of some of her colleagues who leave the communal kitchen area in an unhygienic state.

She found information for a member of her team, although it was unclear why they could not have done it for themselves.

The morning continued in a similar vein, checking the management information data, emails, faxes, team member queries, discussion with peers, with regular glances over to the Operations Manager to check at what she might be looking . . . . . .

elusive: "I employ them to make a difference". Unsatisfied with his reply, I pushed him to be more specific, yet he would not elaborate, merely commenting "that is what I want you to find out". It would be unusual for a private sector company to pay staff without a clear understanding of expectations. The work of the first-line managers is varied and is shown in two vignettes. Vignette one illustrates the work of supervising calls, the nature of which means that they could last for up to three hours. Vignette two, in contrast, is closer to the stereotypical view of work based on high volume calls. Both vignettes illustrate the controls under which work is conducted.

City-Access employs 22 staff as first-line managers. The task requirements of their role are listed in an activity sheet titled which includes the formal job title - Team Leader Activity Planning, which contains sixteen items. The company does not use a formal job description to review performance for this role, but uses this list of sixteen activities as the basis of controlling and monitoring effectiveness of individual first-line-managers. This maintains the prescriptive approaches identified in grand management theory and *petit récits* discussed in section 2.2 (Lyotard, 1984). Arguably it is more detailed than a job description that would typically indicate three broad areas, the main purpose of the job, its scope and the main

Vignette 2 **A life in the day of Jamie in Revenues and Benefits. High volume calls.**

I joined Jamie at his desk as he had already started his day. Having joined City-Access from the private sector, he felt rather like an outsider and of all the first-line managers in my participant group he talked openly about 'office politics' and difficulties between people. He seemed to need to show a high level energy approach to his work as he did not sit for long periods at his desk. He regularly walked around the floor discussing issues with his 12-strong team. They were not in a single row, but spread over two rows. He was not able to keep them all in his eye view at the same time and seemed to have established a routine of checking them or perhaps being seen to check them. He felt controlled by his manager and admitted to telling his team that "shit rolls downhill" – if he was closely controlled, then so will his team members.

He was comfortable with his lack of experience in the service area, and discussed calmly that he had learned significantly on the job and from his team. He kept many computer monitoring applications minimised on his desk-top and he checked them all regularly throughout the morning. He retained in electronic format those reports that related to key performance areas, so that he was able to access quickly either evidence to defend his actions, or to demonstrate his good practice.

Jamie was keen to be recognised as organised and disciplined in his approach to work as a 'good' manager. He checked with peers about the level of detail they included in statistical reports, so that he was consistent with the approaches of others and the needs of his manager. He was sensitive to the 'eagle-eye' of his manager and her views of his contribution.

Jamie took a mid-morning break out of the office to have a cigarette and to buy a cup of tea. He was conscious that he was one of the few who do so and wondered whether his colleagues suspect him of doing less work, or in some way being *"less committed to the cause"*.

Jamie took notes of his interactions with team members for later use in their regular reviews that he conducted. He believed this to be the core of his job. He accepted many interruptions during the morning from the call advisers, each of which he handled in a relaxed and friendly way. His team were comfortable to approach him, as he almost seemed to welcome the interruption.

He dealt with an ongoing disciplinary case of one of his team members, which he handled in a similar way to team member queries – calmly and dispassionately. He was comfortable to handle the more difficult people management issues such as under performance as he believed in fairness and consistency.

tasks undertaken (ACAS, 2012). However, most job descriptions will often an item such as 'any other duty as required by the line manager commensurate with the post' for contingencies. For clarity of understanding of these sixteen activities, they are presented in frequency order in table 4.4.

Table 4.4 First-line manager activities in City-Access

Frequency	Activity
Daily	Review and Plan of previous days performance and current issues
Weekly	Talk 10 to discuss operational issues with staff
	Team briefs for updates
	Team leader operations meetings to cascade information from senior management
Fortnightly	Sickness surgery to discuss absence across all teams
Monthly	Keep in Touch (KIT) to discuss performance
	Benchmarking sessions to listen to non-team calls
	Oracle checks on accuracy of staff data
	Annual leave checks to anticipate potential issues
Quarterly	Individual One-to-ones performance review
	Team coaching and would replace the team brief
Unspecified interval, but supported by agreed targets	Call quality monitoring – remote and side by side listening to calls
	Individual coaching following issues identified in call monitoring
	Absence management and the need for return to work interviews
Other	Buddy system for team leaders to share practice
	Lead roles given as required by the Operations Manager

As can be seen, of the sixteen tasks, only two that are grouped in 'other', sharing practice and lead role were not subject to time or specific target control. This is a considerable restriction on the exercise of discretion for first-line-managers in their work which was very tightly controlled and regulated. This seems consistent with the prejudicial views about the nature of work in a contact centre as a sweatshop (Holman, 2003): first-line-managers do as they are told in a consistent way with limited opportunity to show individualism or flair. At the

time of conducting the fieldwork, first-line-managers had just relinquished the ability to allocate skills sets to respond to changes in the call profiles and workload discussed in section 4.3. This task was now handled centrally by one Operations Manager.

Further, even when first-line-managers monitor calls, feedback was prescribed under five headings, opening, main body of call, closing the call, call summary and exceeding customer expectations. Instructions were even provided for actions to follow, as form of penalty to be applied for underperformance. For example, an adviser who received a performance score of 58% or less for call handling was to receive immediate training or coaching. It was not left to the first-line-manager to decide the course of action despite personal knowledge of the individual and her/his state of knowledge and skills development.

In addition to the activity list, City-Access had a committed policy for leadership built on eight themes shown in table 4.5. These were essentially corporate-specific competencies

Table 4.5 Leadership attributes in City-Access

Attribute	
(i)	Builds and delivers the vision
(ii)	Makes it happen and sees it through
(iii)	Leads for Performance
(iv)	Champions team working
(v)	Creates a learning culture
(vi)	Pioneers new approaches
(vii)	Enables culture of open communication
(viii)	Focuses on customers

(Boyatzis, 1982) that acted as a further standard to enable judgements to be made about effective and consistent individual performance of the first-line-manager. Such standards placed further restrictions on what first-line-managers do and how they do it. Five of the themes, one to four and eight were directly linked to performance and as such are comparable to the call scripts given to advisers to direct what is said. Themes five, six and seven took much more of a humanistic approach and did not prescribe how each was to be achieved, emancipating the managers and permitting them to develop and use their latent abilities. This was a limited remission from the relenting and dominant performance / control discourse.

A further characteristic of first-line-managers in City-Access is worthy of inclusion. As previously stated, City-Access was a private / public sector partnership with the majority of first-line-managers, holding a public sector contract of employment (nine of the 12). Such people have been described as "persons with very highly developed intrinsic motivation to work in the public sector" (Frey & Benz, 2005, 382). Their work ethos is to serve the community as a duty, in the spirit of *noblesse oblige*. This form of civic humanism (Hart, 1998) or "citizen theory of public administration" (Esquith, 1997, p.335), can act as a self-regulator to maintain high standards through using skills and experience. This may be at odds with the fundamental objective of a private limited company to make a profit, and can create dissonance in how first-line-managers view their work. When this is added to the ideals of New Public Management (NPM) which notes a trend from commitment to the following of bureaucratic rules where "rewards are based on performance" (Virtanen, 2000, p.340), first-line-managers in City-Access have potentially many contradictions in their approach to work. For example, they can become involved in complex and emotional discussions in the case of a vulnerable adult who does not have a bed for the night. They may be drawn to their former sense of professional duty of care to provide shelter, but might be constrained by a lack of available budget to fund the provision.

Earlier in this chapter I referred to the idea that contact centres have been compared with "sweatshop or dark satanic mill" (Weinkopf, 2002, p. 456). Some contact centres impose targets on advisers to conclude calls within strict time periods, for example 80 seconds for a customer enquiry. Longer calls will increase customer queues and lead to requests for additional, expensive staff resource. Such rigid controls were not in place in City-Access as they provided advice and guidance to a range of callers. Whilst staff were encouraged to be efficient, there were examples of complex and at times distressing calls lasting up to two hours, after which advisers are offered a break from work. This provided them with an opportunity to discuss the call with a manager to ensure that they were fit to continue working.

In sum, the first-line manager role in City-Access shared a number of the characteristics discussed in chapter two which are summarised here. In terms of what they did, they monitored, supervised and developed a team of call advisers, who themselves responded as the front–line service to 'service users', the public. Constant demands were imposed by the Operations Manager to adhere to agreed performance levels, and processes of staff monitoring, and provide regular reports on activity. Constraints appeared through the operation of rigid standard operating procedures, and the time schedule of actions detailed in table 4.4.

They largely lacked personal agency in being able to exercise choice over what and how work is done, although there was some choice over the timing of call adviser performance reviews (Stewart, 1982). The regimented approach to the role might suggest that the work was a source of frustration. However, as will be explored in chapter six, such frustration was not shown in either their behaviour or attitude to work.

4.6 Manager learning in City-Access

The learning provision that was generally described as "limited" in section 4.4, was even more limited for first-line managers. They had an annual review of their performance at which a review of learning needs was sometimes discussed, but this was not consistent practice. This was a less rigorous review process than that for the call advisers and in consequence it appeared that the learning needs of first-line managers were treated less importantly. Perhaps senior managers assumed that first-line managers did not need regular training. Whilst they had a monthly review and an annual appraisal with the Operations Manager (their line manager), the focus of this meeting was on the performance of first-line manager's team, not their learning and development.

Having said that the learning provision was very limited, there was a structured, formal management development process in place to support newly-promoted individuals to cope with the demands of their new job. There was a contractual condition of employment that required new managers to participate in 'The Leadership Academy', a 12 month programme run in conjunction with a local University. This led to a Postgraduate Certificate in Higher Education, although not a University graduation ceremony. Achievement was, however, recognised at an annual staff awards event. Those managers who had already attained a first degree had the option to attend higher level qualifications, either a Diploma in Management (DMS) studied over two years, or a Master's degree in Business Administration studied over three years. The HRD staff in City-Access advertised this provision to all first-line managers, so that a consistent approach to practice was in place. However, there appeared to be no system of checking to ensure compliance. Only two participants had successfully completed the Leadership Academy, and one the DMS.

Experienced first-line managers were encouraged to conduct peer coaching informally to share knowledge and skills that had been developed through experience. But, they had not received training to enable them to do this. More formal coaching development was

available from trained and experienced HRD specialists, but none of the first-line managers had availed themselves of this.

Most learning occurred informally, on the job. This was consistent with practice generally as noted by www.prospects.ac.uk (2013) that "training for call centre managers tends to be on the job and continues through all grades". Interestingly, of the 16 required activities for first-line managers, ten related to call adviser development, yet only one, buddy system, was in place to support first-line manager development. There was no real support for learning to be a first-line-manager in City-Access. This would suggest that despite the rhetoric of the corporate values statement about the strong focus on learning, processes and resources to support first-line manager learning were lacking.

4.7 Chapter summary

In this chapter I introduced the research context and indicated the controlling nature of work in contact centres generally and shown that this is also the case in the context of City-Access. Aspects of the culture and environment have been analysed, together with a critical analysis of the role of the first-line manager. Characteristics of this role have similarities to the call adviser role in that the activities undertaken and how they are to be approached are very closely prescribed. Learning to become a first-line manager was supported by formal means through education programmes and coaching, but in the main learning occurred informally through on-the-job experiences. This can lead to diverging practice, which may not be helpful to either individuals or City-Access. This has not advanced understanding of the first research objective, to clarify the nature of the first-line manager role in a specific contact centre.

CHAPTER 5 RESEARCH METHODOLOGY

5.1 Introduction

In the previous chapter, I mapped the context for the investigation and will now turn my attention to the research design to produce a strategy to seek answers to the research questions raised in chapter one. I shall begin by justifying my ontological and epistemological position to locate the relevance of my research methods. This will lead to an examination of ethical issues and then options for data analysis before justifying my choice to reveal the themes in the data. The chapter will conclude by recognising the limitations of the research strategy.

5.2 Ontological and epistemological choices

A researcher's ontological stance, how he views the world, needs to be established to clarify the lens through which the research questions will be examined. There are two ontological paradigms that can be followed for social scientific enquiry – realism and idealism (Blaikie, 2007). A realist ontology relates to positivism and assumes that there is a single 'out-there' reality which is separate from individuals who inhabit it. Realism makes assumptions that each of us observes phenomena which are regarded objectively and interpreted as facts in common. This permits enquiries that test established existing theoretical positions (Pugh, 1983) by using deductive methods. Historically, realism has been used in the natural sciences to confirm the valence of theory. Whilst this may be relevant in studying inanimate objects, for example in a geological study, it is unhelpful in social scientific research for two reasons (Burrell & Morgan, 1979). Firstly, it denies the intrusion of human values and feelings into a context, which can be diverse, not least due to cultural differences. Secondly, individuals will not always behave in predictable ways, unlike for example a rock. Inanimate objects do not have the capacity to theorise, "it is humanity that produces science and not the other way around" (Canguilhem, in Rheinberger, 2005, p.188).

Idealist ontologies locate reality in individual thoughts and experience – they assume that reality has no independent existence. Valentin (2006, p.21) posits that "there is no single discoverable true meaning, only numerous different interpretations", suggesting that researchers should be alert to ambiguities, differences and divergences in the social world, itself constituted by people. These ideas have an echo to phenomenology and to Weber's (1947) notion of *Verstehen*, which encourage understanding and interpretation of human activities by an outside observer. Bryman (1998, p.52) is more direct when he comments

that for social scientific researchers the subject matter is “people and their social reality” and they cannot usefully be extracted from that reality to be examined in a laboratory. Additionally, he recognises that to gain an understanding of social reality a researcher requires experience of that reality.

The criticism and limitations of positivism lead me to adopt an idealist ontology that regards “constructions of reality as just different ways of perceiving and making sense of an external world” (Blaikie, 2007, p.17). As I seek to explore individuals’ stories of becoming a first-line manager from each of their perspectives, this paradigm positions the participants as the prime focus of enquiry, not theory. The participants will be shown to be *sui generis* and draw on their unique experiences to understand their reality and it is this that I seek to expose.

The adoption of an idealist ontology limits choices about epistemology as some are more closely associated with realism. For example, empiricism limits the recognition of knowledge to that which has come from observation and experience that can be tested for verification or falsification (Popper, 1961). Rationalism does not consider facts, but thoughts and ideas that are “innate, universal, and shared (Johnson, Dandeker, & Ashworth, 1984, p.150). Being “universal and shared” is not consistent with differing ways of viewing reality.

A constructionist epistemology recognises that reality is found “in one way or another as people talk it, write it and argue it” (Potter, 1996, p.98). This is relevant to this thesis as it explores individual accounts of becoming a first-line manager. In chapter three I concluded that learning for this is not restricted to the work domain, but extends back through the life course to early years. If the conclusions had limited the focus of enquiry to work environments, there may have been a case to adopt a positivist, deductive paradigm. But as wider social worlds are dynamic and “in a constant state of revision” (Bryman, 2001, p.18), I do not consider there to be a single agreed view. Diverse views need to be encouraged in the study to reflect individual accounts of becoming. This justifies the use of a constructivist epistemology, which “reflects the indeterminacy of our knowledge of the social world” (Bryman & Bell, 2007, p.25).

5.3 Research Design

Methodological options

No research strategy can claim to capture thoroughly all features of a research context. I shall therefore justify my intended strategy through a critical analysis of options. In deductive theory, a researcher presents hypotheses that are tested in a context against accepted

theory. This will either confirm or reject the hypothesis. As I aim to explore individual accounts of becoming a first-line manager I wish to discover differing possibilities, rather than imposing a restricted prejudicial view. Deductive approaches will not enable me to uncover individual meaning or realities. In contrast, an inductive strategy permits an analysis of data against theory that can lead to new knowledge, from which further investigations can be made. This is not without its own limitations as 'pure' induction may not be possible as pre-existing knowledge of the terrain cannot be forgotten and ignored. I have already undertaken study of learning about management, and am therefore influenced by extant theories.

A third strategy raises an interesting possibility and that is an abductive strategy. This strategy reflects Peirce's notion of 'hypotheses on probation' (in Levin-Rozalis, 2004), an iterative process of checking and rechecking against observations that gives the opportunity to widen and modify possible explanations. According to Peirce et al. (1998 p.216), "Deduction proves that something must be; Induction shows that something actually is operative; Abduction … suggests that something may be". Writing alone, Peirce is more direct and posits that "abduction . . . consists of examining a mass of facts and in allowing these facts to suggest a theory" (1935: 205).

Use of an abductive research strategy is of interest as it has not been widely used in social sciences, but has been used in the field of information and communication technology, knowledge management and artificial intelligence (Abdelbara, Andrews, & Wunsch, 2003; Kovács & Spens, 2005). The strategy is also known as iterative induction, or retroduction as it allows freedom to explore individual data with the theory and theory with the data through iterative layers of analysis. As this strategy does not deny the existence of theory, I consider this to be a more accurate variation of induction for this project.

Abductive reasoning helps to resolve the 'Meno Paradox'. Although this was explored by Socrates to discover virtue, it is commonly used to consider 'how can I know anything about a subject if I do not know what that subject is?' This is summarised by Nickles (1981, p.89)

> Either you know what you are searching for or you do not. If you do know, you already have it, whence inquiry is pointless. And if you do not know, you would not recognize it even if you stumbled on it accidentally; hence, again, inquiry is impossible, pointless.

Thagard (1988) identifies four types of abduction which are shown in table 5.1 and I shall locate and justify the type to be used in the research, in the next section.

Table 5.1 Types of abduction and their outcomes

Abduction	can lead to	Outcome
Simple abduction		hypotheses about individual situations or contexts
Rule-forming abduction		theoretical generalizations that help to explain other rules
Existential abduction		hypotheses that are based on instinct and guesses about an issue
Analogical abduction		new hypotheses developed from similar situations

Intended research strategy

The limitations of both deductive and inductive approaches led me to adopt a qualitative abductive research strategy in its analogic form. In the same way that I used metaphors to explore definitions of learning in chapter three, I shall use *analogies* of what is currently known about becoming a manager to expand my knowledge of what is unknown in City-Access. As Pierce (1903, p.286) warned "do not attempt to explain phenomena isolated and disconnected with common experience. It is a waste of energy, besides being extremely compromising". Analysing data against existing manager practices, rather than an individual case (simple abduction) adds to potential to make generalizations. Existential abduction does not provide sufficient scientific rigour. As I wish to explore the lived world of first-line managers in a specific context, I do not wish to explain pre-existing rules about managers. Rule-forming abduction is not therefore relevant to the development of new theory.

Gubrium and Holstein (2000, p.263), argue that the world should be viewed from the experiences of those who inhabit it: researchers should guard against replacing social reality with "a fictional non-existing world constructed by the scientific observer". As I have no experience of working in a contact centre, if I attempted to reflect my version of that environment it would be a personal construct of the context, not the views of the participants.

Abductive layers for analysis have been summarised neatly by Blaikie (2007, p.90, emphasis in the original):

Everyday concepts and meanings

provide the basis for

social action/interaction

about which

social actors can give accounts

from which

social scientific description can be made

from which

social theories can be generated

or which can be understood in terms of existing

social theories and perspectives

Dubois and Gadde (2002) have suggested that this research strategy is useful when the research aim is to discover new knowledge and iterate between theory and the data collected. Blaikie, however, considers that abduction has limited applicability to the social sciences, as he suggests that "the nature of explanatory mechanisms is usually well known" (Blaikie, 2000, p. 111). I consider his use of the word "usually" to be a dangerous assumption about research methodology. Researchers should justify their strategies for a specific project and not assume general understanding. I need to *"*remain true to the nature of the phenomenon under study" (Matza, 1969, p.5), consistent with the demand of Gummesson (2007, p.132) who counsels that strategies must "properly capture the critical aspects of the phenomenon we want to understand".

Research strategy verification

Having proposed a research strategy, I now need to consider three key areas to verify its integrity: how can I justify the project data as valid knowledge; the reliability of my data and how my conclusions might be generalized to other contexts. A verification strategy is significant so that I am able to defend possible challenges to the rigour of qualitative social scientific research in comparison to quantitative methods used in the natural or 'hard' sciences. These challenges in effect question whether social science is science. This has led some social scientific researchers to charges of "physics envy" (Bennis & O'Toole, 2005, p.98) as statistical methods are not used. In the context of my thesis, is the discovery of

individual ways of becoming a first-line manager little more than “the repetition of familiar cultural tales” (Miller & Glassner, 2004, p.125)?

Morse et al., (2002) suggest four strategies for verification and its relevance and application to this thesis is summarised in the third column of table 5.2.

Table 5.2 Verification strategies

Verification strategy	Purpose	Application
Methodological coherence	Consistency between ontological and epistemological stance, and methods	An idealist ontology with a constructivist epistemology and qualitative methods
Appropriate sample	Best representation of the cohort	All first-line managers invited – nearly 60% participated
Collecting and analysing data concurrently	To inform what is known and what needs to be discovered	Notes were transcribed within a week and analysed and coded
Theory development	To evaluate the data with existing theory for further development	Adopting an abductive research strategy

Validity

Some qualitative researchers have argued that the term validity is not applicable to qualitative research, yet they accept that what they capture as data does need to have a form of “truth value” (Guba & Lincoln, 1981), leading to the adoption of other expressions, such as 'trustworthiness'. Other qualitative researchers have totally rejected the notion of 'validity', in any form (Altheide & Johnson, 1998; Leininger, 1994) as inappropriate in qualitative enquiry. They argue that truth is only meaningful in a relative way, to a researcher’s ontological and epistemological stance. As this will permit an individual justification of knowledge from a specific project, I need to make my justification to avoid the potential for my interpretations to be considered worthless.

Jarvis (1992, p.18) makes an important point in the quest for truth, “if meaning does not reside in phenomena but in people’s understanding of the world, it is difficult to accept the idea of an objective truth being verifiable”. In interpretive studies, there is a tradition of treating truth as an ongoing process of knowledge claims. Husserl, (in Tieszen, 2005) proposes that the life world existed before science and that the intuited world, as experienced by individuals, existed before the generation of theory. Prehistoric man intuitively discovered how to survive before medical science pronounced on the need to eat and drink regularly. This might suggest that the canons of the natural sciences are little more

than formalised and coded expressions of human intuition, organised by interest groups. If differing world views exist, then no research tradition is granted a pre-eminent claim to a universal view of doctrine. The ongoing debate in the medical world over the efficacy of the MMR vaccine with children illustrates this point (Batty, 2008).

Husserl further claims that truth is "meaning-fulfilment" (in Tieszen, 2005, p.99), based on the principle of intentionality of consciousness - the relationship between thought and action in the perceived world. An individual can start with an intention, a concept, but may not develop this into action that is observable by others. To illustrate this point, at work in a team meeting, a first-line manager may consider taking personal responsibility to complete an action point, but may not utter his acceptance. Husserl makes a distinction between meaning-giving, the intention of an expression or an experience, and meaning-fulfilment when that intention is actioned. An individual discovers truth when experience (actions) matches his interpretation of that experience.

In an interpretivist study, the concept of intentional fulfilment encourages the exploration of different possible interpretations and alternative views. When interpretation of data matches the researcher's lived experiences, conclusions can be assumed through intentional fulfilment against competing claims for truth (Sanderberg, 2005). This serves to add to the richness of the picture revealed. For example, a first-line manager can view a reprimand from a senior manager as either a threat to his practice or even status, or an opportunity to improve. The experience only becomes meaningful to him, when he accepts an accommodation between that experience and his interpretation of it. A difficulty in reaching an understanding of meaning in a context can arise when there is a mis-match between interpretations, experience and interpretation. If an individual is unable to make sense of a situation, a dilemma arises that produces confusion. Heidegger (2005) contributes to the debate by drawing on the Greek idea of unconcealment, aletheia (αλετηια), to open up possible paths for understanding which can illuminate the phenomenon being explored. Yet Heidegger (2005) accepts that this does not lead to truth. Instead he offers the possibility that establishing truth may not always be necessary, inferring that researchers should have confidence in their intuition (existential abduction). He supports this suggestion by drawing on a metaphysical idea from Aristotle "for it is uneducated not to have an eye for when it is necessary to look for a proof, and *when this is not necessary*." (Heideger, 2005, p.157 emphasis added). He suggests a resolution to this tension by revisiting the data through analytic iterations until a new interpretation is found: then fulfilment is established (analytical abduction). In an occupational setting, one form of meaning can be established through conversation and interaction with others. There is, however, a danger that running too many

iterations to produce a multiplicity of interpretations will render interpretations meaningless. Over-extending iterations will not add to clarity in research conclusions. It is apposite to recall a fictional conversation from the novel "Through the Looking Glass and What Alice Found There": "'the question is,' said Alice, 'whether you can make words mean so many different things'" (Carroll, 1982, p.190).

In sum, validity will be established by analysing the data with theory and theory with the data through the abductive layers to reach intentional fulfilment.

Reliability

Achieving reliability is a central feature of quantitative research which uses statistical methods to support consistency in the analysis. It will often be expressed as a coefficient using, for example, Cronbach's alpha. In qualitative research, reliability is more concerned with ensuring that the methods used will produce similar interpretations if used by different researchers. In a project with multiple researchers inter-observer consistency can be achieved through training of the observers beforehand. This will help support consistent understanding about how behaviours are to be categorised or interview responses. With a single researcher, personal subjectivity can be a key feature as Wragg (2004, p.50) comments "we often interpret events as we wish to see them, not as they are". There is also the potential for the participants to present to me an idealised version of their world, not the actuality. My thesis has the potential to produce descriptive accounts of managers' practices, which, however interesting, may not be significant and may be influenced by my viewpoint.

Reliability of my data will be ensured through two approaches. Firstly, I shall use a range of linked methods so that I can contrast how the participants behave with how they *say* they behave. This will build a rich picture of their realities. Secondly, I shall a systematic approach to data analysis that will be justified later in this chapter. Whilst I support the view of Douglas (1976, p.7) that "direct experience as the most reliable form of knowledge about the social world", rigour in coding of themes and a clear explanation of the stages adopted in coding will show that other researchers would reach similar conclusions to my own.

Generalizability

Researchers such as Giorgi (1994) and Jones (1998) question the adequacy of knowledge produced from interpretive approaches. They follow the tradition of researchers in the natural sciences who suggest that the interpretations of qualitative inquiry are limited, as

interpretation from a limited sample, in this case a single case study, will not lead to generalizations. Interpretive analysis is unlikely to generate a universal theory about individual becoming a first-line manager. The type of generalizations this project seeks to produce is informed by Kvale's (1996) notion that an investigation sets a form of precedent that informs future research – analytical generalization. He comments, "by specifying the supporting evidence and making arguments explicit, the researcher can allow readers to judge the soundness of the generalization claim" (Kvale, 1996, p.233). Generalizability can be considered by reflecting on two issues. Firstly, the extent to which readers' relate to the personal ontogenies of the participants. If their interpretations match their experiences as reported in my final work, then they will have meaning fulfilment. Secondly, readers will need to consider how the characteristics of the organisation participating in the project are exhibited in other settings to which they can relate. This refers to his notion of "case law" generalization in the English legal system. Kvale and Brinkmann (2009, p.265) develop this notion further and suggest that analytical generalization from a single case has a long tradition and it is "the researcher's argumentation . . . as well as the reader's generalizations" upon which transferability to other contexts can be made.

For the overall judgement of quality in this study, I shall return however to the notion of trustworthiness, that was introduced in the section on validity above. To evaluate the effectiveness of qualitative research, Guba and Lincoln (1994) propose four criteria against which research can be evaluated. Credibility refers to the acceptability of the interpretation to the participants. They pass primary responsibility for generalizability through the notion of transferability to those who wish to make the generalization. Dependability alludes to reliability and the possibility of revealing the same interpretation if the research was replicated. Finally, confirmability refers to the possibility for the same interpretations and implications to be drawn by others. Table 5.3 summarises how these criteria are relevant to this project.

Table 5.3 Criteria to evaluate qualitative research

Criteria	Application in this project
Credibility	This was confirmed by the participants at the focus group meeting.
Transferability	The case is made using analytical generalization and it is for others to do likewise.
Dependability	The structured nature of the observations and the semi-structured interviews together with the stable nature of work in City-Access strongly imply 'repeatability' of interpretations.
Confirmability	The clear explanation of the logical development of data

analysis gives confidence denying bias and distortion.

Selection of Research organisation

The specific nature of the work in City-Access was explored in chapter four. It makes a fascinating context to study for a number of reasons. Firstly, it is one of the first private-public sector partnerships in the UK and is part of what has become known as the New Public Management (NPM) discussed in that chapter that raises tensions between the practice of professional duty and conformance to management and budgetary principles. Secondly, I have experience of working with all levels of manager in City-Access including first-line managers and have, during my time, questioned the learning provision I have both devised and managed. It has seemed to me that whilst managers have been introduced to learning and management theories, the application of them may be limited. Learners have enjoyed learning sessions, in their assessments improvements in service provision have been written up, yet I am unsure about the strength of the connection between learning and improvements in practice. For example, in course feedback sheets the delegates have regularly noted their enjoyment of sessions, although simply being given time away from work to reflect on practice may have achieved the same result. Finally, in a pragmatic sense the case has convenient access to enable me to spend appropriate time to examine the context thoroughly.

Access and sample

Permission to conduct the proposed study was sought from the Chief Executive Officer. As someone who himself had studied to doctoral level he was most supportive, granting permission and passed further senior management contact to an Operations Director. Through the Operations Director, I met two Operations Managers and a team leader to gain an initial impression of the nature of the role which is analysed in chapter four.

Through concentrating on preparatory studies, to clarify my ontological and epistemological stance, and research literature in the area, I did not make contact with the research organisation again until around three years later. This mistake that could have ended the relationship as the Operations Director could reasonably have assumed that I had lost interest and did not wish to continue. When I made contact with the original Operations Director, I was embarrassed to discover that she no longer had responsibility for the contact centre. However, she remained positive and supportive and provided me with contact details for her replacement who was very committed to the project.

An invitation was extended to all 22 first-line managers of equal status in City-Access to attend a briefing session to introduce the project and seek their involvement. This was a workable number for an interpretive study. To limit the invitations to a selected few would have had an effect, not only on those selected, but those not selected ("why/why not me?") and run counter to the views of Morse et al., (2002) discussed above. At the first meeting nine team leaders attended and all bar one, who was working his notice period, were very supportive. The project and their participation were presented in detail and they were given the opportunity to ask questions. Three candidates indicated consent at the first meeting. Others followed soon after and I attended a follow up meeting to see additional potential participants. Invitations to those who are unable to attend, due to the nature of different shift working were made via email. A total of 12 first-line managers with an equal gender split agreed to be part of the study. It could be argued that a sample size of twelve participants is not sufficiently large to enable meaningful comparisons, but van Manen (1990) argues that the quality of information revealed is much more significant. The participants adopted a pseudonym for the purpose of the project shown in table 5.4

Table 5.4 List of participants

Bob
Christine
James
Jamie
John
Lin
Louise
Maria
Patricia
Philip
Susan
Trevor

Researcher position

A crucial difference between quantitative and qualitative research is the nature of the relationship between the researcher and the participants (Bryman & Bell, 2007). Johnson and Duberley (2000) recognise that researchers need to question their engagement with their research as their biography and experiences have the potential to affect interpretations. They suggest that researchers engage in a process of epistemic reflexivity. This adds rigour to the research yet still recognises that "we do not arrive at 'the answer'. Rather researchers

gain more (but not complete!) understanding of the complex and ongoing relationship which exists between themselves and their research "(Johnson & Duberley, 2000, p.191). In City-Access, the close engagement with the participants through observation and interview gave rise to two potential difficulties. Firstly , for rigour in the verification of qualitative research (Morse, Barrett, Mayan, Olson, & Spiers, 2008), and secondly for perceived power imbalances to change the nature of the relationship. As I had entered the field with the full support and co-operation from the executive management of City-Access, it was possible that the participants did not view me as a detached observer. After all, I could have had a hidden agenda to report back about their practice and be seen as part of the management power relationship that exists in working contexts, revealed in chapter two. This may have encouraged each participant in the interview to present himself and his practice in a more positive light or offer answers that they believed I wanted to hear. When conducting observations, I may have disturbed the practice of call agents by making them self-conscious and presented the participants with novel situations for them to handle. As a late middle-aged male, younger participants and possibly females may not have related to my style of communication and I had to critically assess my role as researcher to establish trust and build my credibility as researcher.

I used four strategies to retain objectivity and counter these potential difficulties. Firstly, the aims of the research were detailed in the participant information sheet in which I explained confidentiality and anonymity together. This was supported by supplying the name of a senior manager who could be contacted to discuss any remaining doubts. I also provided further assurance to the participants in the introduction to the questionnaire about confidentiality and the methods and content of reporting back to the senior managers. I only spoke with the senior managers when the field work was completed, and then on a non-attributable, generalised basis. Secondly, I spoke directly with the call advisers about the observations of their managers to assure them about the nature of my role. I was careful to use everyday language and not appear an aloof academic. They showed keen interest in the research initially and then accepted me as almost as a staff member, although I was an observer more than a participant. I knew that I was not a distraction to them when I was greeted by my first name at the start of an observation and even included in a charity raffle. Thirdly, I sat out of immediate eye contact of the participants so that any movement when making notes could not be seen. They may have been unnerved if their actions were followed by obvious extensive note taking. The managers largely forgot my presence and the call advisers ignored me. All of the post-observation discussions were conducted in locations where our discussion could not be overheard, to maintain confidentiality. Finally, I avoided walking past the senior managers' offices when entering and exiting the building to

reduce the opportunities for them to ask “how are you getting on” and engaging in discussion about specific individuals.

Despite these measures, I accept that I cannot be totally objective, an issue recognised by Corbin and Strauss (2008, p.32) “that objectivity in qualitative research is a myth”. In addition, I was aware that I alone had access to the full data set to undertake a hermeneutic study. Whilst I did record some of the nuances in participant responses during the interviews, such as sotto voce comments about the management information systems, the reader is distanced from the work as he is not able to appreciate them in their entirety and in context. Similarly, the behavioural attitudes exhibited during the observations were noted and interpreted singularly. These included the participants’ confirmation of the interview transcripts which gave them the opportunity to clarify meaning of their life experiences. Both the interview transcripts and the post-observation discussion acted as a form of proxy for others’ interpretations.

However, I believe that accounts of becoming a first-line manager revealed by the participants to be a true reflection of their experiences. Most commented that they had enjoyed the process and some even approached a while after their observations and interviews to say that not only had they enjoyed the experience, but they had continued to reflect on the issues raised. Others went further, explaining that their engagement was likened to a carthartic experience as they revealed most sensitive and privately-held, almost intimate experiences. These have been excluded in the interpretations out of sensitivity. This was supported by my comfort in revealing my own weaknesses as shown by the following examples. During the first interview with Susan, we were both self-conscious so we suspended the observation and discussed our feelings. We recommenced when we admitted and accepted our initial insecurities which improved our levels of confidence. At the start of the interview with John, the digital recorder was full and I could not be used. I had forgotten how to erase recordings and did not have the operating manual. John enjoyed finding an online manual and cleared my recorder. Showing vulnerability helped to build rapport at the start of the interview.

5.4 Research Methods

Methods selected for an investigation need to accord with the espoused ontological and epistemological stance for the project to avoid paradigm incommensurability. Methods also need to be relevant for the scale of the investigation. To discover individual becoming in a contact centre context, I conducted a series of linked methods that broadened traditional

approaches to enquiry. The single site for the investigation became an ethnographic case study, to expose the researcher to elements that may not be easily codified when observed. Studies about becoming managers have primarily used semi-structured interviews. Hales (2005) conducted a diverse study of 135 organisations, including health care, leisure, retail and manufacturing, and legal and financial services. The study by Rees and Porter, (2005) used a similar diverse group and included managers from four different countries, although the majority were from the United Kingdom. Interestingly, neither of the researchers included contact centres in their work.

I suggest that a sole method limits the opportunity to gather rich data, a view shared with Sandelowski (2002) who refers to a naïve overuse of interviews in qualitative research. Additional methods enabled the first-line managers' accounts of becoming to be viewed socially, in terms of interpersonal relationships, as well as sociologically, reflecting their biographies. Using other methods justified below added to the fine grain of the data to reveal a richer account of becoming in the specific context of a contact centre.

Questionnaire

Questionnaires enabled data to be gathered relatively quickly in a consistent form, and are often associated with quantitative studies. The purpose of introducing a questionnaire into this project was to provide an opportunity for the participants to discover the scope of investigation. Not only did the questionnaire provide me with nominal data categories into which the participants might be grouped, such as gender and educational qualifications, it allowed the participants to reflect on their motivations for and how they became a first-line manager. Unless I outlined areas of the research domain that I intended to explore with them, the participants may not have had sufficient opportunity to reflect on how they became managers. In turn, they might have struggled to answer the questions. Preparing their thinking beforehand helped the participants to recall learning episodes that they recounted during later interviews. Rather than relying on memory later in the interview, when each could potentially feel under pressure, participants drew from their recorded experiences. If they struggled to answer a question they may have felt foolish about not being able to answer. This would not build effective rapport, which is needed for sensitivity in delving into personal histories.

The type of questionnaire used was self-completion, delivery and collection; the questionnaire was handed to the participants at the introductory meeting and collected a week later. This avoided difficulties with poor completion rates normally associated with

larger surveys. Face-to-face questionnaires were discounted, as this would in effect be a semi-structured interview. Telephone questionnaires were also discounted as being too controlling. I wanted the participants to present their considered views and to reflect on their experiences, aspirations, motives and influences to date, and prepare for other research methods, without feeling that I chivvied them to answer.

Participant Observation

Participant observation "involves social interaction between the researcher and informants in the milieu of the latter" (Taylor & Bogdan, 1984, p.15). The method enabled data gathering about both actual practice and workplace affordances (Gibson, 1977), which, according to Billett (2002, p.460), provide opportunities that "include the kinds of activities individuals are able to engage in and the kinds of guidance they can access through these experiences". It was important to discover the processes that afford learning as they might privilege or constrain first-line managers' becoming (Morgan, 1997; Billet, 2001). Observations enabled me to witness the physical and psychological environment in which the participants operated, and discover any instances of the exercise of managerial power. By observing behaviour in a natural work setting, "we can start with things that are not currently imaginable, by showing that they happened" (Sacks, 1984, p.25). This required me as researcher to be "interested in people as they are, not as he thinks they ought to be according to some standard of his own" (Bruyn, 1966, p.18). Observations can lead to greater confidence in interpretation as data will not be limited to participant perceptions that may be revealed through interviews, in which they may describe an idealised view of the world, not the reality.

Participant observation in management research is most closely associated with ethnographic studies and "involves switching back and forth between being a 'native' and being a 'stranger'" (Watson, 2007, p.140). It has its roots in anthropology and responds to the call of Park (1922, in McKinney, 1966, p.71) to "go get the seat of your pants dirty in *real* research". "What is required of an ethnographer is neither full membership nor competence, but is the ability to give a voice to that experience, and to *bridge* between the experiences of actors and audiences, 'authenticity' and 'distance'" (Pearson, 1993, p.xviii). A full ethnographic study necessitating many months work was not possible, as I have a full-time job. The style of research that I undertook has been referred to as micro-ethnography (Wolcott, 1995), or even 'jet plane' ethnography (Bate, 1997) as a series of flying visits are made rather than long-term immersion in the field.

Despite participant observation providing the opportunity to gain an insider view, its use is not unproblematic. Entering a workplace to conduct observations can expose a researcher to challenges that he cannot fully comprehend the "subjects' culture and becomes unable to take a dispassionate view of events and unintentionally discards the researcher elements of the field role" (Gill & Johnson, 2002, p.114). In addition, there was a danger that my existing knowledge of manager practices in different contexts may obscure my ability to be objective. Fundamentally, I needed sensitivity to the context through "cultural competence" (Bourdieu, 1984, p.2), so that I gain acceptance from all workers, not just the participants with whom I worked. I did this by behaving in an obtrusive way, sitting out of direct sight of the participants having asked them to explain my presence and purpose to their staff.

To resolve problems of understanding the degree of researcher involvement in the field, Burgess (1984) proposed four possible research roles or identities. They can be considered a continuum from total engagement with the practices in the context to a wholly detached view. The roles are summarised in table 5.5. Due to constraints of time and access, the complete participant and participant as observer were not appropriate. I would need training in work practices to be able to participate effectively, otherwise I would need constant supervision and may risk damaging the reputation of the City-Access. For the complete observer role, it would be difficult to argue that it is ethical, as it does not give individuals the right to choose whether to participate or not. The complete observer has no social contact with participants (Gold, 1958) and this would not have encouraged rapport building in preparation for interviews. Indeed, it may reinforce the prejudgement that I was a 'management spy'. The role I adopted was observer-as-participant as this permitted me, when relevant, to talk with the first-line managers and build a relationship in which my true motives were witnessed in practice. I might also have been able to provide advice if asked. This accords with the researcher-participant role suggested by Gans (1968).

Table 5.5 Researcher identities in participant information

Title	Nature of the role
Complete participant	actively engages with the participants but does not reveal his observations to them
Participant-as-observer	participates in activities in the knowledge that observations will be recorded
Observer-as-participant	has limited interaction with participants but records observations
Complete observer	has no contact with the participants but they understand that observations are being made

A structured approach was used for the observations and drew from nine dimensions proposed by Spradley (1980, p.78), shown in table 5.6. Spradley's 'Grand Tour' dimensions are based on the idea of gaining an understanding of the "*major features*" (emphasis in the

Table 5.6 Observation dimensions

Dimension	Method
1 Space - the physical layout of the offices	Observation notes 1 and photograph
2 Actors – non-first-line managers in the context	Observation notes 2
3 Activities - what the actors actually do	Observation notes 2
4 Objects - furniture and equipment	Observation notes 1 and photograph
5 Acts - specific actions	Observation notes 2
6 Events - e.g. meetings	Observation notes 1
7 Time - the sequence of events	Observation notes 2
8 Goals - the actors objectives	Interviews
9 Feelings - emotions in particular contexts	Observation notes and interviews 1

original) of a context. The elements were sufficiently broad to gather rich data, and have been used recently in a range of settings. It was helpful to Mckellar (2013) in a study of events management to explore social dynamics and the affective dimensions of their behaviour in audiences at music festivals. Jones and Jones (2013) used it to study reflexive inquiry amongst teachers and finally Boblin et al., (2013) recognised a limitation of their research in a healthcare context as they did not adopt the framework. Interestingly, in recognising limitations of restricting methods in a study of work-related identity and learning at work to just interviews, Collin (2009, p.3) recognised that observations are needed "to gain a deeper insight into the processes of workplace learning and work-related identity".

To be able to note observations of Spradley's (1980) list, I developed template one to record the general work context, but restricted it to five of the dimensions. This excluded issues to specific first-line managers and is shown as Table 5.7. It covered the physical working environment, other actors, co-workers who were present during an observation and what they did, other events, for example birthday or other celebrations and finally any feelings or emotions observed. The participant number (#), the date and a description of each event was recorded for each of the five categories in the three columns at the bottom of table 5.7.

Table 5.7 General context observation template 1

Dimension	Prompts
1. Space: the physical place or places	Layout of Desks, chairs, books, computers, charts, use of space Workstations, telephones, personal items, domestics Action, active noise, sound, interaction Social atmosphere
2. Actors: the people involved	The people – gender Staff Visitors
3. Other work related activity	Staff activity Senior management activity
4. Other events	Social time Incidents
5. Feelings: the emotions felt and expressed	Comfort, caring, nurturing, anxiousness, pride, determination

#	Date	Details

Whilst template one focused on the context within which manager work was practised, it was not sufficient to note the specific action of each first-line manager, hence template two was required. Lofland, Snow, Anderson, and Lofland, (2004), and Emerson, Fretz and Shaw (1995) both note the importance of not only recording what is observed, but starting early, initial data analysis so that it is possible to make adjustments to the research method in response to experience. This is shown as Table 5.8, and both templates were used during each observation. To attempt to minimise variations in my concentration levels over three hours, I recorded events in 15 minute 'chunks' to avoid bias for the primacy effect - "information acquired early in the process is likely to carry more weight than that acquired later" (Nickerson, 1998, p.187). I expected the second column, prompts to be the most used as I recorded actual activity observed and attempt to relate this to intentions behind the action. This should relate to the Team activity list discussed in the previous chapter. The manner of performing a task was noted in column three. If I built a picture of the skills and attributes that the participants use, at interview I could probe to discover from where they

learned the skill. Columns four and five were included to enable me to conduct a post-observation review to summarise my views and identify areas that need to be clarified in the interviews or the group observations.

Table 5.8 Observation template 2

Time	Description – what was done? What was intended?	How was it done? With whom? Are any assumptions made?	Initial reaction	Prompts for other enquiry
9.00				
9.15				
9.30				
9.45				

Each participant was observed for half a day conducting their normal duties supervising and advising call advisers. The notes taken throughout the observation period were discussed individually at the conclusion of the observation, as it allowed both of us to understand exactly the data that had been collected, and to clarify fully aspects of their job role. At the start of the first observation, both the participant Susan and I felt rather self-conscious. Her team also appeared to be confused by my presence and early in the observation I took the opportunity to discuss the purpose of my work with them and what was to be reported. All became supportive and at ease with the observation and subsequent observations were handled without difficulty from the outset. After the first two observations, I decided to record this discussion as the comments from the participants about their activities, which at times included a justification, added to the richness of the data. They volunteered interesting comments about the process of observation and generally found it a positive experience, which adds to a sense of authenticity in this research method as well as beneficence.
A typifying comment from John illustrated this point:

> *It's been good I've enjoyed it actually. It is good to listen and perceive how other people see you do things and that. I like that, it's good.*

There was only one surprise reaction to an observation. Maria was embarrassed that I had noted how she had adjusted the clothing and hair of her staff, but accepted it an issue to consider in her future behaviour:

> *I can't believe you noticed that. It's a bit motherly in a way (laughs). I have to watch that.*

The key advantage of the observations was the ability to clarify differences between the participants' discourse and their practice. As a group they did not feel that they were subject

to control and were very dismissive of notions of power. The observations demonstrated the strictures under which they operated and to which they had become inured.

Interviews

A third method used interviews to generate rich data for thick descriptive analysis (Geertz, 1973). Semi-structured interviews adhered to the principles of ethnomethodology and used participants' "practical reasoning and the ways in which they make the social world sensible to themselves as the central focus" (Bryman, 2001, p.53). They permitted "an openness to changes of sequence and forms of questions" (Kvale, 1996, p.124) to explore issues of importance to the participant. Although structured interviewing can be useful to discover ontogenic data about participants, it was too rigid as it did not enable me to pursue unexpected issues that arose during the course of the interview that could be essential to an individual story of becoming a first-line manager. Unstructured interviewing has been considered no more than a conversation (Burgess, 1984).

Interview Design

As semi-structured interview are often considered "an interview guide" (Bryman & Bell, 2007, p.474), the type of questions I used fell into three main types (Spradley, 1979). These are shown in table 5.9. "Descriptive questions aim to elicit a large sample of utterances in the informants' native language" (Spradley, 1979, p.85). For example, I asked 'why did you become a manager?' Structural questions are intended to discover aspects of the contexts that may have had an influence on the participants. These encouraged the participants to reflect on situations and people that have been significant. Finally, I used contrast questions to elicit meaning, for example "to what extent do other first-line managers share this view?" (Spradley, 1979). I also used follow-up questions, to encourage the participants to be more specific in their disclosures and probing questions to pursue a point in greater depth (Kvale, 1999). The questions used are shown in column two of table 5.9.

Table 5.9 Interview questions

Area of question	Prompts
Descriptive questions	***Why did you become a manager?***
Background	Home and upbringing Parents / Siblings / Managers
Motives	Importance of manager role
Image of self	Appearance
Comfort with self	Overlaps between home and work (Venn diagrams)
	Friends knowledge of role Are you 'in a good place'?

	Role consistent with personal values?
Reactions of others	Own Manager / Peers / support staff

Structural questions	***How did you learn to become a manager?***	
First experiences	Fitting in	Who helped / hindered?
When did you first feel a manager?	Situation	Reflections on the situation – current relevance
Role models	What did they do, and how?	Can you adopt the approaches?
Formal education and training	Transferability	
Developing experiences	Learning rituals and practices	Sharing knowledge
	Supporting others	Stages in becoming

Contrast questions	***How does your work environment support you learning to become a manager?***		
Affordances	Equipment	Processes	Office layout
Power	Personal	Organisational	How shown?
Relationships	Role models		

What are your future aspirations (future learnings, what and how)?		
Aspirations and motives	Realism	Consistent with values
Career plan	What do you need to do?	To learn?

Prior to each interview, I analysed data from the questionnaire and the observation to identify specific areas to probe during the interview. This gave me the opportunity to develop truly individual stories as the interview content was personalised for each participant, as illustrated with an example from the interview with Trevor in table 5.10. I used red font as a personal reminder for the specific interview.

Table 5.10 Example of specific interview questions

Area of question	Prompts	Individual areas to explore
Background	Home and upbringing	
	Parents/siblings managers	
Motives	Importance of manager role	Doing a good job seems very important
Image of self	Appearance	Image and identity as a manager?
		What is his perception of his role?
		Operational or tactical level?
		Self-image and profile -- advanced call agent or manager/leader?
Comfort with self	Overlaps between home and	Seems to recognise that he is much more

	work (Venn diagrams) Friends knowledge of role Are you 'in a good place'? Role consistent with personal values?	organised than colleagues Seems to reflect about issues -- himself or his role?
Reactions of others	Own Manager / Peers / support staff	

The interviews were digitally recorded for later transcription for participants to have the opportunity to comment and confirm that the transcript accurately reflected their views. This had a number of advantages (Heritage, 1984). It prevented both the limitation of human memory and lack of consistency in note taking, which can distort what was actually said. Fundamentally it enabled scrutiny by other researchers to counter potential accusations of bias. There are, however, two problems with recording interviews, according to Rafaeli, Dutton, Harquail and Mackie-Lewis (1997): participants may not wish to be recorded and the hardware may malfunction. The degree of participation will be discussed in the ethics section of this chapter and there no issues arose in recording the interviews. The closest to a difficulty came when the storage capacity on the recording device was full before the interview with John. I had not brought the user manual with me, but a resourceful John found it online and the interview proceeded.

The process of transcription used voice recognition software (VRS), recognising that "the whole process of doing the transcription is lonely and tiring" (Roulston, deMarrais, & Lewis, 2003, p.657). The interviews themselves could not use VRS directly as "it cannot access its knowledge of multiple voices simultaneously" (Matheson, 2007, p.550). I copied the interviews to an iPod and followed a two-stage process. Firstly I listened to a short section of what I and the participants' had said through a headset, then paused the recording to repeat the words into the VRS through a microphone. Despite this being a laborious process, there were key benefits. Speed was an obvious benefit as my keyboard skills are somewhat limited, but repeating the participants' words enabled me to re-live the interview and immerse myself in their responses, thus deepening my understanding of the data. Had I used an external personal to transcribe the interviews, they may have missed nuances in responses and not produced such a rich data source.

Pilot interviews

Prior to conducting interviews with the participants, I piloted the interview format with three colleagues, who were themselves first-line managers. Feedback revealed the following responses:

> *"You actually asked few questions and as the interview went for about an hour, it seems that you have the right questions"*

> *"You used the questions as prompts to steer the conversation, but I did not feel that you were directing. You encouraged me to think for myself"*

> *"You helped me to reflect on issues that I had long forgotten about"*

These comments suggested that I had an appropriate balance between allowing participants to voice their views whilst ensuring that my purposes were achieved. I was also pleased with a comment from one pilot interviewee that "*long after you had gone, I reflected on what we had discussed*". An aim of my research, as identified in chapter one was to encourage reflexivity in my participants. In being able to draw information, sometimes rather personal detail from my colleagues gave me confidence to use the approach in the field. The design of the interviews was therefore considered robust.

The interviews ranged from one hour 50 minutes to one hour. Most were conducted in a private room away from the call advisers, but one participant wished to be interviewed off the premises in a public coffee shop. The transcription of the interviews were sent to the participants to ensure that the detail was accurate and reflected views expressed. None of the participants wished to alter the detail in the transcription. The interviews flowed well as they had been carefully prepared using a common structure, with issues for further clarification and exploration noted. These came from the questionnaires, the observation and the post-observation discussion. Success here was due to the effectiveness of the pilot interviews.

Focus group

After the interview process, I invited the participants to a focus group for three key purposes; firstly to give them feedback about the main themes emerging from the project, and then to gauge their reactions to early interpretations as part of my verification and note any significant additional data. Finally, the focus group was an opportunity to suggest how the

participants might use the experience of contributing their stories to consider reflexive action about their futures. I am, in addition, sensitive to the advice from Calman, Brunton, and Molassiotis (2013) to avoid "participant fatigue". Involvement on too many occasions may reduce their motivation to contribute. In addition, the employer may have voiced concerns about the time its first-line managers spent away from their regular duties. The focus group was planned as an agenda item of normal team meetings and signalled my withdrawal from the field.

I initially planned to run a focus group meeting to explore common themes and conclude from the field work. This did not occur, largely due to the logistic of arranging for all participants to be present. The final meeting with the participants in August 2011 was not a focus group, but a sharing of interpretations with seven of the original participants to present initial conclusions and to thank them for their participation. However, many commented that they had continued to reflect on their engagement with the research process and this had led to continuing thoughts about themselves as individuals and their role. This again confirmed the beneficence of the project that was anticipated before entering the field.

5.5 Ethics

Any research project has to be conducted in conformance with the legal requirements of the Data Protection Act (1998). All data was kept securely in locked drawers and electronic data secured by passwords. In terms of ethical standards, Gill and Johnson (2002) recognise the potential for difficulties in this area due to the relationship between the researcher and the organisational context, as well as between the researcher and the participants. Bryman and Bell (2007) suggest that a researcher needs to consider potential harm, informed consent, privacy and deception. Miles and Huberman (1994) extend this to include benefits and reciprocity, and intervention and advocacy. I shall consider each of these in the following sections.

Harm and informed consent

Harm concerns the potential for research to damage either physically or psychologically. The risk of physical harm was low as contact was only made through the work environment. Psychological harm could arise through the processes of reflecting back to earlier times, which may act as reminders of painful or distressing situations that have been forgotten. Harm could even be in the form of being embarrassed at showing emotion in front of a researcher, someone unfamiliar. To counter this, each participant was given an information sheet that summarised the purpose and scope of the project. It identified their role in it with

possible benefits and disadvantages; details issues of confidentiality; and explained how the interpretations will be reported. The consent form also gave them the option to withdraw at any stage of the process and without justification. To become a participant, they each signed a consent form.

Privacy and deception

Although it was not an essential concern of the Chief Executive Officer, I agreed to keep the identity of the organisation private, hence the adoption of the organisation name 'City-Access'. In the event of a participant requesting that any disclosures remain confidential, they were advised that confidentiality would be maintained, unless the disclosure revealed unethical or illegal actions. In that specific circumstance I would report the issue to avoid my complicit involvement. Issues discussed with one participant were not shared with others, and any discussion with the participants was conducted in such a way as to avoid being overheard by others. For example, for the post-observations discussions, we used a quiet area of the office away from the normal work area. To ensure anonymity, each participant adopted a *nom de plume* of their choosing and the coding sheet was kept securely at the researcher's premises, not at City-Access.

Benefits and reciprocity

As the participants' motivation to participate was important, I outlined potential personal benefits in being involved in the process at the first meeting. This heeds a call for interactive research to give "something back to respondents and their communities, rather than research that is pointed exclusively toward restricted academic audiences" (Ellis & Berger, 2003, p.160). Research which only considers the interests of the researcher has attracted comment from McLaren (1995, p.287) that "such a form of engagement amounts to little more than a form of ethnographic vampirism". Possible individual benefits to participation in the project included the opportunity to reflect on the skills and knowledge that each individual offers in an employment exchange, to clarify who they were as a first-line manager, to reflect on the attributes that privilege their participation in work, and to inform their future learning agenda. As a counter argument to psychological harm, discussing issues that may be normally be avoided with a stranger, could actually be cathartic.

Intervention and advocacy

An important issue can arise in conducting research with practising managers – "What do I do when I see harmful, illegal or wrongful behaviour?" (Miles & Huberman, 1994, p.293). I

had no direct remit from the CEO to report back my interpretations and I advised each of the participants at the start of the observation that my role was not to make representations to senior management on their behalf about their issues affecting first-line managers.

5.6 Data analysis

Introduction

The empirical methods adopted by this study created sets of rich and holistic data that presented challenges for analysis; the principal one being the decision on the analytic convention to adopt to explore meanings with the literature in an idealist paradigm. A first analysis of data was intended simply to put the data into "a more usable form" (Sandelowski, 1995, p.375) for further nuanced analysis and interpretation. At an early stage in the process, nothing was rejected as "data cannot be intrinsically unsatisfactory; it all depends on what you want to do with the data" (Silverman, 2004, p.120). Bryman & Bell, (2007, p.579) recognise the complexity of qualitative data analysis, suggesting that the outcome of interviews and participant observation produces a "large corpus of unstructured textual material". Whilst this can emancipate the analyst to justify an individualistic strategy for a specific project, it can raise doubts about rigour in data analysis. My challenge was to propose a strategy that will stand scrutiny and this was reached after a consideration of a range of different strategies.

Data analysis options

Cognitive mapping

Cognitive mapping had an initial attraction for the project as it enabled the researcher to look for broad grouping of themes. In the process of sense-making, it could reveal potential themes by developing a pictorial representation of the data themes to explore with participants (Eden, 1988). However, it was not my intention to jointly construct meaning with my participants. A limitation of the technique is that as it is closely related to, and draws on Kelly's (1995) personal construct theory, it can lead to premature identification of themes which restrict the exploration of other possibilities. Since cognitive mapping encourages a 'big picture' overview of the data, I consider the approach was too limiting a strategy to explore the subtleties and nuances in the data.

Conversation analysis

Conversation analysis (CA) is the analysis of talk that occurs in social settings. It traces its roots to the writing of Garfinkel & Sacks (1970) and has two tenets that are central to its use:

indexicality, which suggests that meaning is dependent on the social context within which the conversation occurs; and reflexivity – what is spoken is constitutive of the social world. It "is a rigorous and systematic method for examining social interaction (rather than language *per se*)" (Samra-Fredericks, 2004, p.214). Heritage (1984) suggests that CA is predicated on three hypotheses. Firstly, that talk (interactions) is structured as a sequence. Secondly, the interaction reflects the context within which it occurs, and finally no data can be seen as irrelevant, echoing Silverman's (2004) comment noted in the introduction to this section. Whilst the data contain some elements of interaction between managers and between call advisers, the research strategy for the purpose of data recording is to reveal the individual stories of becoming rather than group processes in becoming. Additionally, Bryman and Bell (2007, p.521) suggest that the purpose of CA is to uncover "the underlying structures of talk in interaction". As such, CA had limited potential to explore individual stories. The research strategy did not need to elicit issues such as 'turn taking' in conversations, or how the participants used pauses and breaths when observing the participants in their social setting. However, as this tradition has roots in ethnomethodology there may be benefit in revisiting the technique at a post-doctoral stage to explore social learning more specifically.

Data analysis possibilities

Template analysis

Template analysis provides a flexible technique, rather than a prescribed methodology, that enables a researcher to "tailor it [the method] to match their own requirements" (King, 2004, p.257). Madill, Jordan and Shirley (2000) suggest the value of template use in analysing a context from a constructivist position, to bring order to the data, given that "there are always multiple interpretations to be made of any phenomenon" (King, 2004, p.256). Nadin and Cassell (2004) distinguish between matrix analysis, which focuses on summarising descriptive data, and template analysis, which produces an overview of the data. They suggest that template analysis can lead to data overload, but the two can be used to complement each other. In considering template analysis, I was mindful of advice from Sandelowski (1995, p.375) that "any framework for analysis must ultimately be data-derived, or must earn its way into the study by virtue of its fit with the faithfulness of the data". A framework is very useful for organising data into displays, but does not provide clear guidance about how to extract meaning from the display.

Data reduction

Miles & Huberman (1994) suggest a process of data reduction to give a formal structure to analysis. Following data collection, they suggest that data reduction is undertaken leading to

displays (templates) and conclusions. Data reduction is not separate to analysis but an integral part of it, as it privileges the process of "selecting, focusing, simplifying, abstracting and transforming the data" (Miles & Huberman, 1994, p.10).

Analysis is suggested as steps in a sequence (Miles & Huberman, 1994, p.9):

- Affixing codes to a set of field notes drawn from observations or interviews
- Noting reflections or other remarks in the margins
- Sorting and sifting through these materials to identify similar phrases, relationships between variables, patterns, themes, distinct differences between subgroups, and common sequences
- Isolating these patterns and processes, commonalities and differences, and taking them out to the field in the next wave of data collection.

Miles and Huberman continue by advising that the four steps should be followed by "elaborating a small set of generalizations", and "confronting those generalizations with a formalized body of knowledge in the form of constructs or theories" (Miles & Huberman, 1994, p.9), which is abduction.

A strict adoption of the process of data reduction as the writers propose could give rise to two problems. Firstly, the fourth step above might imply a form of data testing, as initial themes are sought in a subsequent visit to the field. The research strategy is to explore data, not test it. Secondly, reducing data into elements could be viewed as a process of atomising elements into isolated units of analysis. This had the potential to distort meaning that could be revealed from a holistic analysis.

Analytic induction

Miles and Huberman's (1994) four-step method outlined above can trace its roots to the tradition of analytic induction (AI). Znaniecki, who is credited with introducing the idea, suggests that it involves "inducing laws from a deep analysis of experimentally isolated instances" (1934, p.237). It also establishes "theoretically valid connections between events and phenomena which previously were ineluctable" (Mitchell, 1984, p.239). Johnson (2004, p.165) suggests that AI is a process to "generate theory grounded in observation of the empirical world" through four phases in analysis:

Phase I	Gain access to the phenomenon of interest
Phase II	Define phenomenon whose variation is to be explained and identify variations. Categorise those variations in terms of shared characteristics and definitions
Phase III	Create a provisional list of case features common to each identified category
Phase IV	Present theoretical explanations of variance in the phenomenon (already tested through observation)

Noting close similarities between Miles and Huberman's (1994) three stages in data reduction and Johnson's (2004) approach to analytic induction, three steps for data reduction were adopted and shown in Table 5.11. Step one involved coding in nVivo (QSR). Step two led to reflections about themes that might not immediately fit broader groupings. Step three led to the key themes in the data. Miles and Huberman's (1994) suggestion of a return to the field was not used as I wished to discover the participants' fresh views without potential colouring by exposing them to some of my themes. In addition, I have bracketed Johnson's (2004) suggestion that theoretical variances will have been *tested*, as it is not consistent with my epistemological stance. The three steps indicate a process that led to themes being viewed in a display (template), but the method of revealing the themes still needs to be justified.

Table 5.11 Synthesis of data reduction and analytic induction methods

	Miles & Huberman	Johnson	Practice
Step 1	Affix codes	Define and categorise	Initial coding in nVivo
Step 2	Noting reflections	Provisional list	Refining / re-coding
Step 3	Sorting and sifting	Case features	Clarifying themes

Content analysis

Content analysis is an accepted methodology to impose order on the data as it seeks to "quantify content in terms of pre-determined categories and in a systematic and replicable manner" (Bryman & Bell, 2007, p.304). The language used in the definition immediately raises concerns about its appropriateness to a qualitative abductive project. "Quantify content" suggests a positivist deductive methodology, and "pre-determined categories" also indicates a deductive approach with *a priori* knowledge. Fundamentally, both of these issues preclude the wholesale adoption of the technique for this project. In addition, as a reductionist approach with its terminology of 'a coding unit' (Baxter, 1991), and 'a unit of analysis' (Downe-Wamboldt, 1992), it has the potential for the data to lose meaning as a datum is considered in isolation rather than in context.

However, there were elements that contributed to the analysis strategy. Analysis of the data can give rise to many themes and my task was to justify the central themes. Weber (1990, p.12) proposes that a "central idea in content analysis is that many words in the text are classified into much fewer content categories". This method helped to clarify what is potentially immediately obvious from the data, and what might require more careful investigation. Spens and Kovács (2006, p.379) clarify this further by positing that "content analysis can record both manifest (explicit) content as well as latent (implicit) content". In addition, the idea of 'a theme' (Polit & Hungler, 1991) is relevant as I pursued key themes in the data. The counting of words, as suggested in content analysis, did have some usefulness as it helped to reveal the extent potential themes within the data – the data density. It was not however, the final arbiter of establishing a theme. An expression I used was, the size of the number of incidents counted 'put me on enquiry' to investigate the theme in greater depth. When coding the data, counting supported my decision-making in on-coding, although I was alert to the possibility that a theme could be significant despite having few instances. In the development of analytical framework I had a strategy to sort and order the data into displays that reveal themes, but this did not enable the data to be explored for nuanced meaning. Methods for this purpose will now be examined.

Data analysis strategy

Discourse analysis

Despite the criticism from Alvesson and Karreman (2000, p.1128) that discourse analysis (DA) "sometimes comes close to standing for everything, and thus nothing", the preferred method of analysis was DA. It has been defined as "how individuals use language in specific social contexts" (Dick, 2004, p.203). Potter (1997) suggests that discourse analysis can be used in different ways and as such it has greater flexibility than conversation analysis due to the ability to interpret more than just conversations. Other forms of text can be handled, not just conversations (Bryman & Bell, 2007), and therefore the questionnaires and observation notes used in gathering data can also be included. DA is anti-realist and is therefore consistent with the justified idealist ontology of the project, and as it is based on a constructionist perspective, it is coherent with the epistemology.

DA has an attraction for the thesis for two principal reasons. It enables the data to be analysed through *interpretative repertoires,* and grouping the data into themes. This offers the participants the possibility of a "more democratic involvement in the research process, co-construction of knowledge and possible emancipation" (Lawless, Sambrook, Garavan, & Valentin, 2011, p.267). Secondly, consideration to be given to the extent of the resources

used in conveying ideas, described as the *quantification rhetoric* (Potter & Wetherell, 1994). This enabled the themes identified to be explored in greater depth. In addition, Bryman and Bell (2007) suggest that DA privileges an analysis of the detail of the discourse, the rhetoric used to construct ideas and individuals' accounts of their experiences. For example, in relation to the data, early analysis revealed that DA was useful as most of the research participants used kinaesthetic language to describe busy periods of high call volumes, for example, *"we are getting battered"* (James), *"we are taking a hammering"* (Louise). The extent of the use of such interesting language in other areas was explored more widely.

DA has similar origins to grounded theory (Glaser & Strauss, 1967) but in DA, meaning is grounded in the data more broadly than just social actors' accounts of their everyday lives. Länsisalmi, Peiró, and Kivimäki (2004) suggest that grounded theory "focuses more on uncovering phenomena and processes, whereas discourse goes deeper . . . into analysing . . . sociocultural practice".

Critical discourse analysis

Critical discourse analysis (CDA) "seeks to discern connections between language and other elements in social life" (Fairclough, 1995, p.230). Other writers, (for example Parker, 1992; Philips & Hardy, 2002), suggest that social reality from individuals' perspectives is understood by their discourse. In other words, individuals draw their understanding of who and what they are by what they *say*. This provides an interesting contrast to the study of becoming a manager by Reedy (2009) who adopted an existential focus to individuals - what individuals *do*.

A critical lens is valuable to explore issues of power in an organisational setting. Research by McKenna (1999, p.102) in the context of a local authority, which has obvious relevance to this study, suggested that the "notion of discourse identifies the importance of the power of defining culture". CDA will be useful to explore issues around relationships and power, and potential tensions between the organisational structures that can influence an individual's behaviour and an individual's discourse (Fairclough, 1995).

Data analysis process

In summarising the earlier discussion, I proposed a method for sorting and grouping the data so that they became manageable, and a method to explore the fine-grained meaning. This develops table 5.11 and leads to my adoption of the following five stage model for data analysis shown as table 5.12.

Table 5.12 Data analysis process

Stage	Action
Stage 1	Data collection and transcription Verification by participants
Stage 2	Defining the phenomenon and identifying variations by - Coding the data in nVivo - Reflecting and noting on the first initial coding and coding-on
Stage 3	Clarify data features - Identifying the themes in the data
Stage 4	Produce data displays
Stage 5	Meaning making using discourse analysis

5.7 Organising data for analysis

As the field work has generated a potentially overwhelming amount of data, I needed to apply rigour to refine them for critical analysis. The process for data analysis that was used is now outlined.

Stage one – collection, transcription and verification

Three data sources, notes from the observation, the post-observation discussion and the interviews were personally transcribed using voice recognition software (Dragon Naturally Speaking 10). Each of the files was stored onto a portable music player (iPod) so that the recording could be listened to, and paused so that the data could be personally spoken directly into Microsoft Word 2007. Any corrections and ongoing 'training' of the software to improve accuracy were made before continuing. This proved very time consuming - the 16 hours 53 minutes of interviews took 61 hours 28 minutes to transcribe, an average of just over five hours for one hour of interview. This is a significant improvement to my pilot interviews before entering the field which took closer to 12 hours for one hour of interview, as the recording was manually paused and then typed. However, the time investment enabled significant immersion in the data and served a dual purpose of reacquainting me with the data and deepening my understanding of the participants' accounts as I spoke their words. When presenting accounts from the data, I shall present data using ten point **bold** font and *italicised* font for that of the participants. The interview transcriptions were sent to the participants for respondent validation and none of them wished to alter any detail in the

transcription. Interestingly, when confirming the transcription, John and Trevor stated that they had enjoyed the process, and Lin used the experience to reflect on her life position:

> *This feels like counselling (laughs)*
> **Does it?**
> *Yes, it makes you think. Because I'm not one of these people . . . I'm not a deep thinker, I had never really. . . . I reflect on things but not . . . . . I don't know . . I am a mixed bag.*

Lin further commented subsequently (unplanned meeting) that in reflecting about her life course, she had begun to question whether she wanted to continue in her current job, as in her interview she had discussed her earlier appetite for travel.

Stage two – defining the phenomenon and identifying variations

Data from the three sources, observation notes, observation discussion and interview, were coded in nVivo 8 (QSR). Data from the questionnaire were separately entered into an Excel spreadsheet. At the time, I considered the questionnaires more as a way of introducing the research field to the participants rather than a rich data source. On reflection, this was a mistake as I prejudged its potential value and therefore imposed an unnecessary limitation on the research strategy. It would have been more helpful to have all data together to simplify the process of analysis.

The data were initially coded into 56 free nodes, through a combination of personal reflection from both my management experience and practice as a management educator and the literature surveyed in chapter three. Such reflexivity is consistent with the abductive research strategy and follows the advice from Giorgi that to elicit meaning from data in a phenomenological study, the data need to be divided into parts which he labels “meaning discrimination” (Giorgi, 1997, p.246). The descriptions of these ‘meaning units’ enable a researcher to clarify the data further for relevance. Given my constructionist epistemological stance, it is not appropriate to impose *a priori* categories on social phenomena: the process of analysis is a process of discovery through which an *a posteriori* understanding is reached. Some researchers use a variation of this strategy known as constant comparison (see for example Glaser & Strauss, 1967; Dye et al., 2000). However, constant comparison is essentially germane to grounded theory approaches which, as it was argued in this chapter is not appropriate to this study.

Little evaluation of the data was undertaken at this stage, as use was made of parallel coding so that data could be coded in two or more nodes reflecting its richness as well as the possibility for confusion. King (2004) suggests that parallel coding will only be problematic in positivistic research. An example of parallel coding is shown below. This was coded as both personal image and management work:

> *If there is a challenging situation . . . I'm not . . . I'm human . . if there is anything that I need to confront then it probably will worry me in the night before. If it is something that is awkward then I will think about it. But I don't think I want to be liked. I hope I don't want to be liked, because I would hate that (laughs). If something needs saying, then it needs saying.* Maria

As the resultant list was too broad for meaningful analysis, I subjected the data to further scrutiny to seek potential key themes or data groupings. A process of data reduction in an interpretivist study is an essential element in data analysis, although it does expose a potential criticism that such a method is more akin to a positivist approach. This is not necessarily the case, however, as Miles and Huberman (1994, p.11) suggest that reduction does "*not* necessarily mean quantification". In further analysing the data, I was guided by the number of sources of the data and the number of references. For example, there was one reference to gender, which was deleted as it referred to a customer comment, not a comment about their gender by a participant. Surprisingly, given the job role title of the research participants, there were just two references in the data to leadership. One concerned leadership from a parental perspective and was recoded under managing and parenting. A second datum had some reference to becoming and was recoded as motivation to be a manager:

> *I don't know, I suppose some people it is just in them isn't it to lead? I never thought "I want to be a manager", it just happened type of thing.* John

Twelve nodes were recoded as shown in table 5.13, together with my justification.

Table 5.13 Refining and clarifying the nodes

Original coding	Sources	References	New code	Justification
Conducting a one to one	1	1	Management work	Part of the role
Fairness	1	2	Future aspirations	Original miscoding
Family background	2	3	Early life experiences	More appropriate title

Gender	1	1	Deleted	Referred to a customer attitude and not to first-line manager work
Leadership	2	2	Motivation to be a manager	More relevant
Managing older workers	1	1	Management work	Accepted as part of the role
Managing your manager	4	5	Power	A vital skill to survive in a controlling environment
Personal responsibility	2	2	Attitudes to work	Linked to accountability
Process of getting a management job	1	1	Early experiences of management	Considered part of transition
Regrets	1	1	Personal motivation	Related to personal improvement
Taking on extra responsibility	2	3	Future aspirations	Comments linked to doing more in the future
Thinking like a manager	2	6	Acting like a manager	The data related to thinking before acting

Tree nodes were then considered to provide the potential for the data to be analysed rhizomatically (Nicolini, 2009). A rhizome is a biological term for a plant that extends its roots via bulbs that themselves start to produce further roots. This analogy offers a convenient suggestion for analysing data to form a ‘bulb’, or a clustering of themes and has been used to explore adult learning by Kang (2007). A reflection of the overview produced by the 44 nodes suggested that the process of becoming might perhaps follow a life journey process, from early life experiences to performing the role of a manager with both ‘in-context’ physical and behavioural issues, together with personal motivations. For example, the range of early life influences and motivations formed the first ‘bulb’ as they related to formative experiences. These were distinguished from later influences in which role models was a relevant theme. Learning the role of a manager and performing it then followed before the final groupings of personal themes, a rather loose title for an eclectic group of 10 topics, and work attitudes and behaviours.

Stage three – clarify data features

Whilst the process thus far has shaped the data into more analytical ‘chunks’, it still contained attributes that had few references and retained topics that may not be relevant to the specific aims of the study. It has already been suggested that phenomenological

analysis is informed by reduction. Eidetic analysis of the data into broad groups of themes, "through the imaginative varying of attributes" (Banchetti-Robino, 1997, p.314), enables a researcher to use his personal understanding to lead to a meaningful and authentic viewpoint (Crotty, 1998). Through this form of analysis, the data suggested five themes: three key stages in personal development; early life, experience of work before becoming a manager and working as a manager. This is consistent with the resolution in table 3.9 from chapter three that synthesized learning and identity development into four stages in becoming – provisional self, early professional, senior professional and master. In addition, there were two areas of influence that apply to each of the three stages; the context and relationships with other people. Examples of influences in the context are management processes, such as performance review (which was coded under the parent node workplace) and formal learning interventions. People influences came from learning from others. This conclusion extends table 3.9 further by revealing a second important influence of the context.

As the process of on-coding commenced, it became apparent early in the process that some themes appeared in more than one theme. For example, identity and personal motivation to be a manager appeared in manager development for Bob:

> *Who am I identity-wise? As an individual, I am very clear on that. Who I am within the organisation . . . that is . . . perhaps a different thing altogether. That goes between where your reality is and where your aspirations may lie.*

Stage four – data displays

A summary of the data themes is shown as table 5.14 which includes an analysis of the numbers of references and also the number of words for each theme. Fewer results could suggest less relevance, or a limitation in the research strategy. In this analysis, the theme occupational development contained relatively fewer responses and was therefore analysed further. This resulted in re-coding the 28 references into other nodes. For example, roles models was transferred to development in context to isolate learning from others, as distinct from individual experiential learning that is covered in manager development (learning from life and learning from work). At the same time, for rigour in the analysis I considered it important to check the coding against the original first coding before finally committing to detailed analysis against the literature. This was an opportunity to consider whether or not I have tainted the data by forcing it into a node that does not reflect my initial perception.

Table 5.14 Relevance of themes

Analysis of themes	Sources	%age	References	%age	Words	%age
Formative development	43	36.1%	154	36.1%	39879	29.3%
Occupational development	13	10.9%	28	6.6%	9354	6.9%
Manager development	14	11.8%	61	14.3%	44393	32.7%
Developing in context	33	27.7%	132	30.9%	21400	15.7%
Relationships	16	13.4%	52	12.2%	20888	15.4%
Totals	119	100.0%	427	100.0%	135914	100.0%

Stage five – meaning making using discourse analysis

This process will be undertaken in chapter seven.

5.8 Limitations of the proposed strategy

I recognise that any research strategy will have its limitations and I have justified a carefully selected set of methods to explore phenomena from the participant's viewpoint. These have been shown to be consistent with the stated ontological and epistemological stance. Whilst this will not privilege grand theorising, it is the "basis for mid-range theorizing about the phenomena and forces at work" (Connolley, 2010, p.42). This is widely used in social scientific research to counter limitations about research being limited to a single site of one organisation. Such "knowledge produced in the context of application" (Gibbons et al., 1994, p.3) has been referred as 'mode 2' knowledge, and is "characterised by a constant flow back and forth between the fundamental and the applied, between the theoretical and the practical" (Gibbons et al., 1994, p.19). In short, this is another way of describing abduction. Mode 2 reflects conceptions of praxis and learning by doing in a given context. It is further characterised by four key features: "transdisciplinary knowledge . . . heterogeneity: diverse, transient and flexible organisations . . . research as reflexive and dialogical . . . new forms of quality control emphasizing social accountability" (Bresnen & Burrell, 2013, p.27). This contrasts with the perceived hegemony of 'mode 1' knowledge which is based on traditional, disciplinary-based knowledge.

5.9 Chapter summary

In this chapter, I have established the philosophical framework to locate the study and have justified the use of the identified research methods. This is a more thorough enquiry than has been seen in other ethnographic studies with the inclusion of individual observations in the field. The research strategy is rigorous so that interpretations can be considered valid.

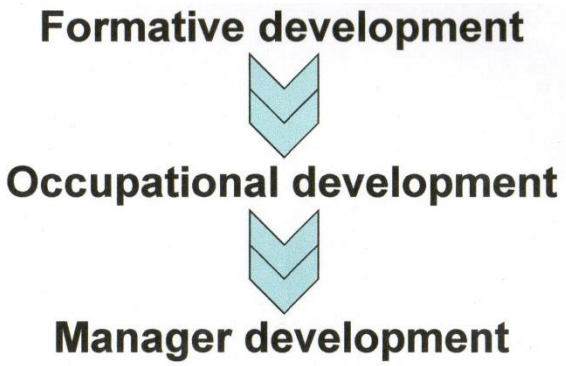
The methods revealed rich sets of data for analysis so that a clear view of the accounts of becoming a first-line manager is revealed. The adoption of systematic approaches to data analysis also support confidence in interpretations. Generalizations from the analysis will be proposed against extant theory as analytical generalization for future research in different contact centres in addition to applying the framework for soundness from Guba and Lincoln (1994).

CHAPTER 6 INTERPRETATIONS ON BECOMING A FIRST-LINE MANAGER IN CITY-ACCESS

6.1 Introduction

This chapter presents key interpretations from the study, that are accepted at face value before exploring their implications in chapter seven. The interpretations are structured around the three stages of development that were abducted from iterations between the data themes and the literature. They were summarised in figure 3.4, which is repeated here for ease of reader understanding. These stages traced what was learned and how it was learned, moderated by the identified influences on learning.

Figure 3.4 Three stages of development



Presentation of the interpretations from each of the three stages of development will be structured around the four modes of learning and their influences. This was included as figure 3.6 which is also repeated and is supplemented by a narrative summary of the model in table 6.1. For consistency in presenting the themes, the context influences will be introduced first, as they assumed an increasing importance in the life course to become a first-line manager. All the influences restricted in a progressive way, the exercise of personal agency. However, it was the influence of 'significant people' at each stage that made the essential impression on the lives of the participants in their becoming a first-line manager in City-Access.

Figure 3.6 Dimensions of learning to be a first-line manager

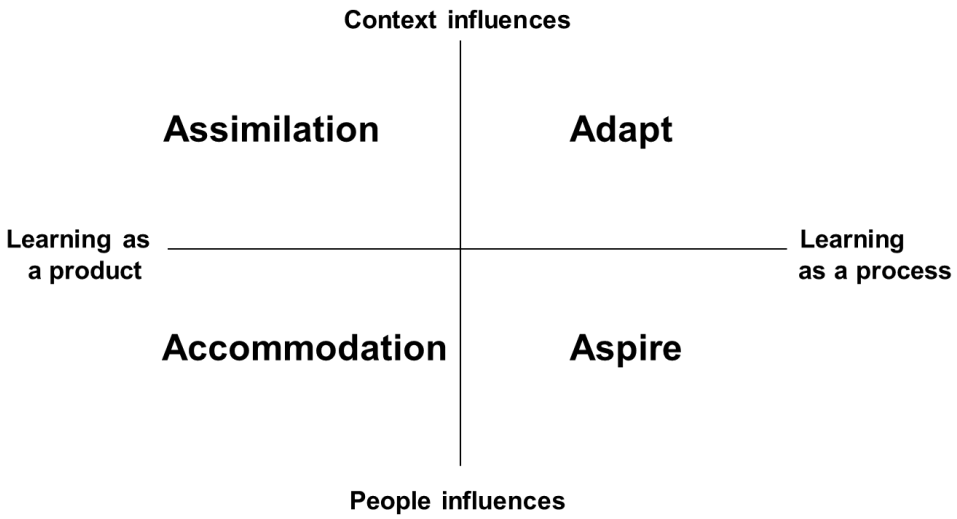


Table 6.1 Summary of modes of learning

Learning mode	Key influence	Illustration and example
Adapt	Context	Individuals adjust their ways of working and conform to group behaviours, norms and culture to gain acceptance. This is shown through giving and receiving support, the standard of dress and attending social events.
Assimilation	Context	Individuals incorporate the accepted protocols or standards that operate in a context into their conduct. The standards could be performance benchmarks or organisational policies that guide decision making.
Accommodation	People	Individuals accept and conform to the views of significant people and develop values from them which they later refine through their experiences. For example, parents inculcate emotional control in behaviour and teachers reinforce the need to achieve.
Aspire	People	Individuals exercise choice about what they do and the behaviours they show to others. This helps them to be the person they wish and can lead to a sense of ontological security.

The extent of data in each stage of development varied, as they reflected the different ways that context and people influenced the individuals. This is shown in table 6.2 as data density,

a rudimentary graphic representation to depict the relative contribution of the data. This style of presentation will be used in each of the three stages of development to show the relative contribution of the different learning modes.

Table 6.2 Density of all data

Stage of development	Data density Few ---------- Many
Formative	
Occupational	
Manager	

To distinguish the different voices in presenting the data, the narrative contribution of the participants will be displayed in italic font and my own in bold font. Other data from observations will be shown in regular font.

6.2 Stage One - Formative development

The first stage of development accounted for almost half of the word total for the stages, as shown in table 6.3, and was a major influence on the participants becoming a first-line manager. When recognising also that it accounted for nearly two-thirds of the data references, a persuasive argument can be made for it as a cardinal influence. In this section I shall present interpretations that illustrate how context and people influences helped to shape the development and identity of the participants to become first-line managers.

Table 6.3 Density of formative development data

Mode of learning	Data density Few ---------- Many
Adapt	
Assimilation	
Accommodation	
Aspire	

Context influences

Adapt

In early life, the context in which the individuals lived was the home, and included family and friends, and school. In terms of the need to adapt to 'group norms', there were few references in the data to siblings and friends. Jamie recognised that his elder sister had had some influence, but this was similar to that of his mother in learning domestic chores. This was very limited as his sister left the home when Jamie was ten years old. Separately, James spoke about his *inspirational brother*, who inspired as he set himself life goals, something he continued to seek. Friends did have some capacity to help people feel a connection with others, a form of esteem. In discussing her reasons for not wanting to resit A level examinations after obtaining poorer than expected results, Patricia revealed her need for acceptance:

> *"I think I just didn't like the idea of being left behind by all my friends because they went to uni so the thought of me doing that was just full of dread"*.

However, other participants did not report a strong need to adapt in formative development.

Assimilation

In terms of assimilation, the data revealed the need to incorporate standards were restricted to two short references to religious influences from Christine and Phillip. They used their faith upbringing to illustrate the development of values that are important in how they conduct themselves with other people. Bob spoke about the limited effect that school had on him as he *was too busy having a good time and fun*. Philip too could not identify particular influences as he talked about going through school *in a daze*.

In contrast, the participants consistently referred to parents and notable teachers. The contribution of significant people (Toor & Ofori, 2008) to the maturing of future first-line manager attributes in the participants did have a fundamental effect and will now be examined.

People influences

Parents and teachers were identified in chapter three as "significant influencers" on young people (Lake & Eastwood, 2004, p.1) and the data supported this view for the participants. In this section I shall examine how the participants found an *accommodation* between the values, behaviours and motivations of both their parents and teachers before considering

how they might use their agency to *aspire* to the future. The attributes learned and from whom are summarised in table 6.4, which also includes examples of how the participants revealed the attribute in their dialogue.

Table 6.4 Attributes learned in formative years

Source	Attributes	Sample participant narrative
From parents	Achievement drive / 'Doing the right thing'	*"Work hard. Get a good job and be self-reliant"*
	Emotional awareness	*"Respect your elders. Treat people like I would wish to be treated"*
	Self-confidence	*"Go on, you can do it*
From teachers	Achievement orientation	*"I'd only get praise when I worked hard. Take pride in your work"*
	A sense of equity	*"You really got support from the teachers when you show that you have an interest and were willing to work"*
From self	Potential to make personal choices	*"I did not want to be like him"* *"I was just me"*

These attributes suggest that being a manager is perhaps nothing more than the exercise of everyday social skills that children learn (Stanton-Chapman & Snell, 2011). For example, in responding to my question about how choices are made about deciding an appropriate response when dealing with others ("how do you read people?"), Patricia responded:

> *"Life teaches you that doesn't it? I don't think that has anything to do with being in the workplace, I think it is just life skills"*

Trevor affirmed Patricia's view, pointing to the unexceptional nature of the first-line manager role:

> **Does being a team leader draw on your life experiences?**
> *"Yes, yes because even just being in work is an experience but you need to . . . you don't just meet people in work, you don't just talk to people in work. They are social skills or life skills, you use every day."*

Two participants supported these views and Louise went further to state that there may be innate qualities that are needed to be a first-line manager that potentially exclude some from being considered as candidates for the role:

"I think life skills and experience . . . Life skills I think yes. I think, you know, some people will never make managers."

Accommodation

Parents

Achievement drive

Through observation and emulation, the participants' future behaviours were shaped by their parents (Kathard, 2006), towards the need to develop an achievement drive, associated with 'doing the right thing' and securing a good job. Job security appeared to be linked by parents with hard work, a drive for achievement. Bob talked about how he was rewarded for demonstrating a strong work ethic, consistent with the values of his *"strict family"*. In turn, this may have been influenced by the family's military background. The idea that in life one has to work hard also came from a number of the participants, including Patricia who wanted *"to go into a job where I work hard and get paid for the work that I do"*. This was reinforced by Philip who discussed the idea of *a "fair day's pay for a fair day's work"*. Maria introduced a subtle nuance to the argument when she talked about the need to be *"willing"* to work hard, an idea that could only be sustained by a strong work ethic. The idea of working hard suggested that not only would application to work be necessary and unavoidable, but that effort would be recognised and rewarded. Philip provided a typifying summary to illustrate the source of their work ethic:

"I think it reflects on you, but it is personal pride and pride in your job, pride and wanting to do the best job you can. I think it is important to do things, which goes back to when you were a child being brought up, to learn to do things well."

Some of the participants' mothers were both strict and risk averse when it came to areas of schoolwork and choice of subjects, and seemed to limit future aspirations to ensure that the minimum economic necessity of 'putting food on the table' is achieved. Lin identified this point and her use of the present tense to describe her mother hints that there may have been little progress in a generation:

"My mum was "no, you can't". Because she is . . . I think that was the way it is."

The maternal influence was, however, not limited to the female participants as there were no references to mother as a positive influence for a specific future career. In Trevor's case, he was mindful of economic necessities:

"I had a Saturday job while I was in college and then it was just kind of like . . . I could do with more money . . . I suppose it was to get my mum off my back".

Louise was a gifted young artist, yet her mother constantly dissuaded from pursuing her interest in the belief that it was a pastime, not a proper subject to study as preparation for the world of work:

"But my mum on the other hand was totally negative. She believes that even to this day that academic is Maths and English and those subjects alone. She thinks that any other gifts that you have are secondary. So I kind of went with the flow because you need a job, and you need to do this, you need to do that."

This was in marked contrast to her father *"who was very creative and artistic".* Due to a specific circumstance, she was forced to model maternal behaviours, which could have reinforced the stereotypical view of females as home-makers, yet Louise saw it more as an opportunity to develop the skills of managing and organising:

"I remember my mum and dad going through a financially difficult period and I was there as the elder child while mum went to work and I managed things for her if you like. I was like a little mini mum. Maybe that . . . obviously it influenced me. But I have always been sort of . . . yes, a person who has been able to manage whatever it is . . . whatever it is, whether it was looking after the two kiddies. I always took charge."

All the fathers of the participants had work experience which they used to inform and advise their children. Fathers were clearly a key influence for the achievement drive, as the participants spoke of wanting their fathers to be proud of them, an attribute that was not attributed to mothers. James did not take up an interesting foreign assignment after graduation from university, *"much to my dad's dismay"*. The participants were delighted when fathers showed pleasure at their behaviours and achievements, even if it surpassed their own, as illustrated by Patricia:

"My dad was just amazed that his daughter was going to university because he came from a secondary modern kind of thing; he didn't get into grammar school"

It was interesting to note that only one of the participants, Jamie referred to his father with the more formal father, possibly as it was clear that he had little, if any, respect for him. All the others used the more affectionate term dad.

Emotional awareness

The second attribute that was influenced by parents was emotional awareness, which was typified in the data by discussion about effective collaboration and cooperation with others. It was mentioned by all participants and the theme appeared seventeen times overall and is linked with emotional intelligence dimensions of emotional awareness and understanding others discussed in chapter two. The theme was typified by the expression used by Trevor, Louise and Bob, *"always treat others as you would have them treat you".* Indeed, Louise went further in expressing dismay when such behaviour was not reciprocated in her current role:

> *"I think it is awful, awful that you see senior managers and they just treat you like you do not exist. And you give your soul in here I think."*

Parents passed on their personal moral codes which, as will be revealed were present in all stages of development. These are exemplified in the following data:

> *"My mum and dad always taught me right from wrong*." John

> *"One thing I have brought up with is manners and respect for people."* Jamie

Self-confidence

There was no sense of the participants' parents conforming to the Victorian edict that 'children should be seen and not heard' (Valentine, 1996), although Bob did recognise that he was brought up by a *"Victorian mother to a degree"*. Parents encouraged their children to be self-confident, the third attribute, but it was fathers who provided greater encouragement and freedom to experiment with their lives, as Christine exemplified:

> *""You can do better, you deserve better, you can do better", my dad always used to say. "Don't say I wish, say I will"."*

Fathers were also more interested in their children's future careers which the following example illustrates:

> *"Careers advisor gave me a list of jobs that would interest me as I enjoyed Biology. My father just wanted me to do whatever made me happy - but was so pleased that I would be going to University."* Patricia

The significance of the paternal contribution is encouragement for their children to exercise their agency and be self-reliant as an independent person with a strong work ethic, a view summed up by Philip:

> *". . . work hard, you shouldn't be like a lazy person, you should be the one who gets on and does things. If you are going to wait for someone to give you something, you are not going to get it."*

In sum, parents provided a foundation to the skills and behaviours needed for individuals to become a future first-line manager. They offered their children a view of the world as an individual who could find acceptance in a range of contexts by showing 'traditional values'. This is associated with 'doing the right thing' by parental values - they learnt emotional awareness, self-confidence, and the need to achieve and behave collaboratively with others.

Teachers

Teachers provided the second people influence in the formative phase of becoming a first-line manager. What is worthy of comment before presenting the specific detail is the affectionate way the participants remembered their teachers, as they used very positive and emotive vocabulary used when discussing teachers' contribution. This was lacking when they discussed the contributions of parents. I have illustrated the affection by adding emphasis in **bold** to the participants' contributions:

> *"**absolutely fantastic** teacher."* Patricia

> *"**fantastic** English teacher. The teacher was fantastic because she taught us to write in italics so that when we wrote off for jobs our letters would stand out, she would tell us."* Christine

> *"there were a couple of teachers at school who really **inspired** me."* James

> *"**a very special** art teacher . . . reminded me that I did have a gift and you can do a lot with it - lots of praise and encouragement."* Louise

Trevor went further and thought of a significant teacher in terms that were close to a personal relationship with the comment *"I think I had a **connection** with her".* Trevor wanted to do better in this teacher's subject as she treated him as an adult which he respected. This echoes the value from parents of *"treating others as they treat you"* as well as the desire to please.

Achievement orientation

More widely, teachers played an important role in encouraging their students to achieve to a high standard which reinforced the parental achievement drive. This is a nuanced difference that encouraged the participants to see a link between effort and achievement. Patricia spoke about finding the study of English relatively easy, but she *"had to work hard at sciences"*, and did so to gain the respect of her *"fantastic teacher"*:

> *"I'd only get praise when I worked hard and so it felt good to get praise because I knew it was something that I really worked hard at to get".*

The data suggested that encouragement from teachers helped the individuals to combine a strong sense of needing to achieve and have high standards that could be maintained in life, as Christine clarified with an example from her English teacher:

> *"She would always try to get us ready for going out into the big wide world. She taught me that you must never use 'nice', 'lovely' and 'got', because there are much better words than those. I 'red-pen' things all the time, I can't help it. I have had to 'red-pen' the job evaluation a colleague has done."*

Sense of equity

Yet the support that teachers gave for an orientation to achievement was conditional on the motivation and drive of young people. This led to the second attribute learned from teachers - a sense of equity. Young people were shown that the degree of support or attention that they could expect to receive is related to their commitment. Maria spoke about the lack of support teachers gave to those peers whose limit of ambition was to *"get a little job"* or worse, *"go on the dole"*. She found that:

> *"It was mainly teachers not pupils that really influenced me . . . you really got support from the teachers when you show that you have an interest and were willing to work."*

James spoke about a teacher who incentivised a class through reciprocal behaviour:

> *"He used to have this tactic of 'half-time'. . . every lesson was an hour, he would split it up into two 20 minute segments and then you would have your 10 minutes half-time. It was a sort of . . . you can relax at the end of 20 minutes. But he also used it as a sort of tool to, you know if you don't behave yourself, we are not having half-time."*

This was seen as a form of early training to ensure that young people made appropriate behavioural responses when dealing with others, an important 'life skill', further reinforcing the social skills that were initiated by parents. In experiencing their teachers displaying consideration for others, the participants were exposed to adult behaviours that they could model, further developing their emotional intelligence in the area of fairness and respect for others. This was summarised by Christine with the view that:

> *"I can say what I feel, non-judgementally and somebody does not have to agree with what you are saying, you can debate it. But you would know their point of view maybe*."

Aspire

There were few examples from the data that revealed the exercise of individual agency to be a consistently strong element in formative development. There were, however, two notable examples of participants who demonstrated their agency - Christine and Jamie. Christine recognised how structures can attempt to exert an influence on individuals to modify their behaviour. Even at an early age, she felt a strong need to resist such influences and assume labels imposed by others. She chose not to conform to group norms and she had the personal confidence to accept her difference:

> *"My best friend did me this picture . . .she went to art college . . .and it is a mountain and it is supposed to be me going up, and . . . she put right across it this word 'rebel', because she always thought I was a rebel."*
> **Did you think of yourself as a rebel?**
> *"I thought of myself as an individual not as a rebel."*
> **Do you see a difference between the two?**
> *"Yes. Rebel is kind of like an angry person, I wasn't angry, I was just me. I didn't conform, but does that make me a rebel. I don't think so. School was quite a pressure thing for me."*

Christine seemed to have had an innate sense of drive to assert her individuality. Despite passing the examination to go to grammar school, she chose to join her friend at a secondary modern school. She describes one teacher as being *"devastated"* who commented *"don't come back [to the school] because you have let down me, your mum and the school down".* That was a very aggressive comment to an eleven year-old child that could have been damaging, yet Christine had the self-confidence to demur and found support from another teacher *". . . you need to make your mark. That is what she taught us all of the time"*. This affirmation appeared to have emboldened her, as she later resisted her father's choice of boyfriends and is still married to the man to whom she was engaged at the age of fourteen.

Jamie discussed negative and offensive attitudes and behaviours in his largely absent father, which were anathema to those he had learned from his mother. He chose not to emulate his father's behaviours and allow them to override what he had already accepted from his mother. By the time he was exposed to them, his founding behaviours had given him the equanimity to make personal choices and reject the inappropriate behaviours of his father. He was nonetheless magnanimous enough to recognise a useful paternal contribution to his development about the need for punctuality, an important 'life skill'.

For the other participants, there were no such distinctive demonstrations of agency, as the formative years were characterised by childhood exploration. It is unsurprising that none of the participants disclosed an ambition to be manager in their early lives. This is consistent with the general point about career aspirations noted in the introduction to chapter three. The comment from Jamie was typical:

> *"It was never like, when I was 12 at school – "I know, I'll be a manager", I never dreamt of it. You don't, do you? It is not something that you aspire to be, do you know what I mean?"*

In revealing their thoughts about a career as a young person, some reported the more traditional, visible occupations, such as teaching and law, but it is interesting to note the breadth of interest areas. These were based on developing hobbies, influences from the media, particularly television, as well as very specific occupations such as a microbiologist and RAF military policeman. The dominant influences came from parents or family and teachers. All the career aspirations with their influences are shown in table 6.5.

Table 6.5 Early career aspirations

Occupation	Influence
Engineer	Family encouragement to have a trade
Air hostess	Personal love of travel
Pilot in the RAF	Personal interest in computer games
Professional golfer	Personal interest in the sport
Interior Designer	Encouraged by father and teacher
Run my own business	Parents and teachers – find a job you like
Midwife or microbiologist	Father and teacher
RAF military policeman	Family
Teacher	Personal interest in music
Lawyer	Parents and teachers
Civil Servant at Whitehall	Teachers and siblings
Detective	Personal interest in books

Although each participant did state an ambition, many expressed early indecision, which is typified by James:

> *"I think at school stage I never really knew what I wanted to do career-wise, I just had this sort of vague notion of teaching. I knew that I wanted to go into higher education, partly and maybe because I wasn't decided upon a career, and also because I was interested in the subjects I was looking to study."*

Lin was even less clear less clear about her aspirations, which appear to extend into her current position:

> *"To be honest I have never really known what I wanted to do."*

For most, their early lives seemed typified by insecurity and indecision about their futures, perhaps because they concentrated only on immediate situations. Bob encapsulated this view clearly with the comment:

> *"You live for today, when you are young, you do, you don't see the consequences of as and when something may or may not occur. You don't have the benefit of age. You have no ties so therefore you can be more reflective - things change."*

Others illustrated the "bewilderment of young people when faced with a 'tangle of values'" (Eppel, 1966, p.6), regarding their world and life outlook. Two comments typify the responses:

> *"I had no real ambition when I was younger".* Jamie

> *"It was not until last year at school that I really decided what I wanted to do. Before that, I was like . . . lost, what do I do, what do I do?"* John

Two of the participants did show early approaches to stake their independence, yet in different ways:

> *"There are a lot of people are quite happy to sit back and just let things happen, but I kind of wanted to take control and sort of make things happen."* Trevor

> *"My family were traditionally all in the army, so I wanted to be different."* Bob

Trevor wanted to assert his independence, but Bob was less precise as he simply did not want to follow the career choices of his parents and siblings. The comment from Susan is however interesting, because her ambition is linked to the values of managers in the public sector noted in chapter four:

> *"I have never particularly wanted to work for the private sector full stop. So I have never really had a huge amount of ambition, but I always wanted, I always knew that I wanted to be on more of the public or voluntary side of things."* Susan

The belief in a career of service is an essential characteristic of first-line managers in this context and in Susan's case her sense of self is coincident with the values of her work sector.

Identity in formative development

During the interview, all of the participants were asked the direct question "who are you?" Most struggled to articulate an answer, typified by Louise who seemed taken aback in replying *gosh . . . that's a tough one*. Maria went further and even showed discomfort in considering her reply:

> *"I don't know how to answer that . . . It is dead hard . . . I don't like the question."*

Of all the participants, John had the least difficulty and reticence in responding to the question. Without much hesitation he commented:

> *"Er . . . that's a very good question Who am I? . . . I suppose I am just your normal everyday kid who wanted to be a footballer."*

What they were all able to discuss was attributes that could be recognised as Ricoeurian aspects of character such as *my beliefs, my values* (Christine); being *adaptable* (John); *enjoy life and get things done,* (Philip). James did not reveal his own identity directly but did so by identifying habits in others that he did not share:

> *"I don't like people who will say one thing to you and then go and do another. . . I respect people who are straight. I find it hard to respect some people."*

In this first phase, the participants' sense of character was developed from habits seen in their parents and teachers, shown in table 6.1. The limited contextual influences noted earlier resulted in no data references about identification and association with structures.

Summary of formative development

In sum, in formative development the *aspire* mode of learning provided limited opportunities for individual experimentation. For the most part, the desire to please outweighed their need for self-expression. The formative development stage was characterised by the development of knowledge, skills and behaviours to accommodate the dominant views of significant people. There were limited opportunities for the first-line managers as young people to self-determine. This stage was, however, most successful in equipping the individuals with the attributes, the life skills to face the world of work. The character they had developed would enable them to perform the role of a first-line manager in City-Access in the future.

6.3 Stage Two - Occupational development

Starting work is a life transition and presents the opportunity for individuals to explore the world beyond the relatively safe confines of family and school. The data in this theme contributed only around one tenth of the word count for the stages of the unfolding picture of individuals becoming a first-line manager as shown in table 6.6. This is a similar distribution to table 6.2 but shows a marginal increase in context influences and a small reduction in the exercise of individual agency, aspire.

Table 6.6 Density of occupational development data

Mode of learning	Data density Few ---------- Many
Adapt	
Assimilation	
Accommodation	
Aspire	

The data suggested that this stage was an opportunity for the participants to affirm and consolidate the attributes developed through formative experiences by exposure to both different contexts (Bardi, Buchanan, Goodwin, Slabu, & Robinson, 2014) and a wider sphere

of people who had limited duties of care towards them. The specific contribution of this stage to the individuals becoming a first-line manager in City-Access is summarised in Table 6.7.

Table 6.7 Attributes learned at work

Attribute	Sample narrative from the participants
Gaining acceptance at work	*"Go in and put on an act "*
Accept work controls	*"It was really boring but it was a wage coming in"*
Learning about being a manager	*"I observed the effects of different approaches to management, both good and bad."*
Experiment with personal boundaries	*"That has not worked, I can walk away."*

Context influences

There were limited data about the effects of working contexts on individuals as the participants spoke of the important influence made by significant people, as they did in the formative stage. There were, however, two examples that illustrated coping strategies in transition. One individual adapted work by making behavioural changes and another assimilated work standards to retain employment.

Adapt

Gaining acceptance at work

Being in a working environment helped one participant to recognise that she needed to *adapt* her behaviour to conform. Susan revealed that she needed to develop coping strategies to deal with her insecurity, and recognised the contribution that working made to her development as it *did me a lot of good with my social skills*. Whilst at university she worked in a bar and adapted her behaviours to cope with the job demands and to become accepted by her peers, a skill she recognised that she used in her current role:

> *". . . you have got to go in and put on an act and that is what I do here. I think that is what everybody does. I think that is where I first learned it."*

She developed her point further when discussing how she separated work from home:

> *"At home, I don't have to worry about being nice to people, which I suppose I should be."*
> **Is there an element of a façade? Is that a defence?**
> *"No, I think that is just . . . you know . . . the way you need to behave in work, in the workplace."*

Assimilation

Accept work controls

Maria's approach to the transition to work was an assimilation of the controls placed on workers and followed the maternal influence of the economic necessity to earn a wage:

> *"My first job, it was anything basically that I could get. Jobs came up, we needed money so we were in there. I was with Abbey National as an IT desk adviser . . . It was really boring but it was a wage coming in so it was fine to keep me going."*

The Abbey National job was part of a team of international advisers. She accepted without question the poor working conditions and the instrumental training that was offered as it enabled her to retain her job. She sought relief from the tedium through social contact with workers of her own age, which, as a linguist was also an opportunity to practise her language skills.

The significant influence on learning in occupational development was not the context, however, it was overwhelmingly down to other people.

People influences

Accommodation

Learning about being a manager

On entering a workplace before they were appointed to a manager role, the participants were subject to the behaviours and controls of their line managers. The data pointed to an important contribution that these people made to individual development. They acted as role models in both a positive and negative way. I noted both the level of detail that each was able to recall in giving their accounts of manager behaviour and the emotion and attendant body language that accompanied their discourse. In a discussion about autocratic managers, Louise stiffened as she responded to a question about people influences at work:

> *"When I have been managed and I have had managers that tightly control, I hate them. They don't think you have got any initiative, allow you to be . . . to develop, to be more than you are within that role. I think that just stifles people. I don't like micromanagement."*

James recalled how one deputy manager caused anxiety in her staff and the relief that accompanied the occasions when she was not in work:

". . . as my first experience of working environments he was a nice manager to have. The deputy was an absolute bitch - we were all really scared of her. But he was a lot more laid back and she was like Margaret Thatcher - she was quite frightening really. But she was only on a job share, so we didn't mind and would often say "she's not in today so we can relax" (laughs)."

The most compelling example of negative management behaviour was provided by Bob who, despite witnessing an actual assault on a colleague which he recounted in an animated way, demonstrated equanimity in his conclusion:

"When I worked in the truck business the manager there, his style was to scream and shout and to threaten. I came in one day and he had a driver by the scruff of its neck up against the wall, and he was screaming at him . . . waving his finger, spittle flying out all over the place . . . it was horrible. This guy [name] who I worked for got his management skills from the managing director of the company. He also emulated what he had seen in another organisation. He perceived and believed that that was the way that you needed to behave, so that is what he did. I actually took my style - and hang on, I thought that these are all the things that I do not want to be. This is not a way to treat other people as a person."

Bob's manager had learned his behaviour in turn from his manager and he adopted it unquestioningly. After all, if the manager's behaviour mirrored that of the managing director, someone who is likely to be the most significant person in the organisation, then he is simply learning by accommodation. The truck business has traditionally been associated with 'macho' leadership and top-down control (Brooks & Reast, 1996). In such contexts where undesirable behaviours were not challenged, learning from negative behaviour was as important as learning from appropriate behaviour.

A less emotive contribution was made by Philip, although he concluded by suggesting that for him, being exposed to negative experiences helped him to learn how he wished to use more inclusive behaviours when managing others at work:

Have there been any particular role models that have helped you as a manager?
*"There have been a few - I feel I take a few bits out of different people there have probably been a few that have helped me by showing me what **not** to do."*
Really, so like a role model in reverse?
"Yes."

The values shown by each of these line managers were inconsistent with those of the participants, who had been brought up to respect others. The idea of restricting

resourcefulness in others or worse, frightening and intimidating them was antithetical and caused feelings of unease. Occupational experiences gave the participants the opportunity to observe contra-indicators of successful manager behaviour.

These examples were, however, balanced by examples of positive and appropriate behaviour. The need to be skilled in communication was something that Susan learned from a previous manager. She recalled with fondness:

> *"One of my old managers was a fantastic manager and I would like to be like her."*
> **What did she do that you particularly recognise?**
> *"She was just great. People shout at you about work and whatever and she just handled it so well to bring people back to where they should be. She was just I suppose a great communicator, open. I feel that sometimes I do not communicate as well as I should and I will blame everything else. But I'm sure she had the same pressures as me, but she still managed to communicate well."*

Jamie recognised, also with some warmth, the value of respect by a manager to her support staff – interestingly, the same value that he had learned earlier from his mother. In an answer about the effectiveness of learning, he also provided an effective summary of the eclectic nature of learning from role models:

> *"I learned a lot from her level, she spoke to me with respect and treated me with respect and if you did something really well, you would know about it. You take bits from each."*

Christine learned from one manager that on occasion it is appropriate to take action outside of standard operating procedures and that being a manager may not always require an individual to follow a rule book unquestioningly:

> *"He relaxed the rules a little bit. I am quite - it is black it is white. If somebody requested leave and there was no leave he would say "well I need somebody on Saturday, so if you do Saturday you can have it". He made me look at things which are so flamin' obvious; at the time it just was not done."*

Aspire

Experiment with personal boundaries

In addition to observing manager practice at first hand, entering the world of work was also an opportunity for the participants to explore their capabilities and recognise that they would need confidence to secure and retain a 'good job' and be independent of their parents.

In John's case, perhaps his previous experience of working in an industrial context heightened his unease when he started to work in an office environment. He had been successful as a welder – "*I was earning about £250 a week . . . for an 18-year-old back in 1990 that was pretty good"* – but worried about being able to perform in other contexts as this might threaten his income:

> *"Before I first went 'live' I was thinking "Oh my god am I going to be able to do this?" Then after a couple weeks I was thinking "what were you worried about?" And then from then, I had gone on to different call centres after that and it is pretty much the same everywhere you go. Most call centres are the same. After you go in you get a new system thrown at you, you get training you think "OK"."*

In contrast, Christine saw work as an opportunity to continue the exploration of herself and experiment with her potential that was a feature of her formative years:

> *"You have to learn sometimes, don't you? You have to learn, you let the lead off little bit and see how far . . ."*

However, to explore potential required the participants to have personal confidence, which was not universally present in all participants. Lin preferred the safety of her father's business but was unclear why:

> *"I ended up working for my dad for three years and then I went to Australia for a year."*
> **Why did you decide to work with your dad then?**
> *"I dunno - it was like a safety thing really. I did not have the confidence to go out and get a job that I wanted. I did not know how to in a way."*

Bob was one of the most confident of the participants and used early work experiences as a true exploration in a spirit of live for the day; *so I just went from one* [job] *to another - you do when you're young, don't you?* He felt liberated by not having responsibilities:

> *"It is not as if you've got a £100,000 a year job and you need that security because it pays your mortgage, your wife and kids and everything else which is in there. Your precedents have not been set at that stage, so it allows you that flexibility to say "okay fine, that has not worked, let's sit down and I can walk away". So that is basically what I did."*

He *"wanted to be a chef because I do actually like cooking"*, so he worked as a kitchen porter. Subsequently he worked in soft furnishings, carpet retailing and a furniture company which lead him into a job in finance. Redundancy gave him the opportunity to travel around South America before he settled in City-Access. There was no regret in his tone about his varied experiences. He had *"earned a lot of money"*, but had spent it enjoying life; *"I had houses, I had cars and all that".*

Identity in occupational development

As already noted, there were relatively fewer data about occupational development, although two contributions about identity are worthy of comment. Bob provided an intriguing view that occupational identity *"goes between where your reality is and where your aspirations may lie"*. He accepted that the self in work was a compromise between available job opportunities in one organisation and his own sense of career potential. He accepted that he may have to leave City-Access in order to progress his career, as this may broaden his knowledge, skills and experience so that he could later return to City-Access in a higher position.

Philip recognised from his experiences of being *"managed by lots of different people, the ones who support you and understand you and listen to you"* that the habits of an effective person in work were tied to the *"belief that if you are doing something, you should do it well*." This was an important characteristic of his image. He identified with those people who had well-developed emotional intelligence.

Summary of occupational development

In occupational development, as in formative development, *accommodation* of other people was the dominant influence, although the context did have more of an effect. Individuals were subject to specific forms of control as they witnessed and were subject to manager power. This gave the participants options about their future behaviour as managers. Whilst the *aspire* mode of learning provided further opportunities for individual experimentation, it was moderated by the other three modes.

Thus far, the data about formative and occupational development have been restricted to the participants' accounts, from the questionnaires and the interviews. In the next section, a deeper understanding will be possible as data was drawn from the observations and post-observation discussions. This further supported the adoption of a broader range of research methods that have characterised limitations in other ethnographic studies.

6.4 Stage Three – Manager Development

The data in this stage contributed to the majority of the data, around half of the total word count for the three stages as shown in table 6.8. This shows the increased influence of the context and a further reduction in the exercise of agency.

Table 6.8 Density of manager development data

Mode of learning	Data density Few ---------- Many
Adapt	
Assimilation	
Accommodation	
Aspire	

In the same way that starting work was seen as a life transition, so promotion into a manager position presented transitional challenges to individuals. As in the previous sections I shall firstly present context influences and the people influences, although given the richness of the data in both influences, the section will be structured more formally using each of the four modes of learning. The contribution that this stage makes towards individuals becoming a first-line manager in City-Access is summarised in table 6.9.

Table 6.9 Attributes learned as a first-line manager

Attribute	**Sample narrative**
Resilience in adapting to the dominant culture	*"First-line managers should come from the ranks"*
Learning in and about context	*"There is a strong sense of community here"*
Conform to self-presentation as a manager	*"I have to be smart"*
Accept the imposition of context controls	*"No-one bothers with the screens"*
Accede to the powerful	*"We are told where we have to sit by the Operations Manager"*
Accept restrictions on personal choice	*"You kind of learn . . . what is acceptable and what is not as a team leader".*

Context influences

In this section, the data point to the significant influence made by the work environment on individuals becoming a first-line manager. They will be structured using the two dimensions from the conceptual framework developed in chapter three, adapt and assimilation.

Adapt

This mode of learning contributes to the first three attributes in the journey to become a first-line manager – resilience in adapting to the dominant culture; learning in and about context; conform to self-presentation as a manager.

Resilience in adapting to the dominant culture

City-Access selected each of the participants for the role of first-line manager through a rigorous assessment centre process. The candidates' attributes were assessed against the eight leadership themes noted in chapter four using three methods; an observed group exercise, an individual presentation and an interview. The views of most were summarised by John who considered it a "*gruelling"* process as "*it was like a five-hour interview process"*. It was, however, considered a fair process, although assuming the role and gaining acceptance as a first-line manager was not a consistently straightforward course.

The data revealed two particular contextual difficulties when first-line managers commenced the role that required them to be both resilient and self-confident. The first difficulty revealed in the data was the transition on internal promotion from call adviser to first-line manager. Some found the passage to be rather traumatic for which they received little senior manager support; they were largely left alone to cope:

> **So what kind of development support do you get from your manager?**
> *"I'm trying to figure the last time I had it . . . a while ago (laughs) and you probably find that in any company that you went into. There is a lot of focus on "your team needs this", because you do have monthly one to ones. As a team leader you sort of get . . . not overlooked, but I think I can understand that if the team is performing well then everything must be all right. I think that is the classic in a contact centre environment".* Maria

For others, Susan in particular, it was a test of their resilience due to the negative and at times hostile reactions of support staff:

> *"I think I struggled for quite a time to be honest with you."*

Susan had a particularly difficult transition period. This may have been due to the perception by support staff that acceptance as a first-line manager required specific knowledge of the work area. She was promoted into a first-line manager role without having the 'skills set' of her team:

"People resented the fact that I had applied for the job and there was very much a sense of why has she got the job, she does not know anything about what we are doing. That very much went on for a while."

A second difficulty arose for those appointed from outside City-Access as a first-line manager from another organisation. Their lack of experience of working in the public sector was an issue for Maria:

"I had never worked in the public sector before. I was worried about the whole union aspect because I have never worked with unions before. All these things were really worrying me."

An additional difficulty arose due to their lack of 'skills sets', the phrase used to describe the competencies of call advisers, which affected their credibility to be recognised as a first-line manager. The dominant view of call advisers in City-Access appeared to be that first-line managers should come 'from the ranks' rather than from outside, perhaps due to a sense that time-served handling calls conferred such credibility. Bob illustrated this view:

"You go into an organisation first and foremost . . . I was the enemy - I have come from the outside."

Learning in and about context

The data clearly include examples to illustrate the limited effectiveness of the formal learning provision; there was a recurrent theme that the most valuable forms of learning take place through personal experience. Performing the role is for most a valuable way of becoming a first-line manager:

"*I think you can only learn [that] by doing the job."* Louise.

"I don't see an experience to be a bad experience if you have learned something from it I suppose." Trevor.

The data supported my earlier conclusion that learning as an innate social experience. My time spent in the field was characterised by noting the degree of cooperation between the first-line managers. I do not believe that my presence as an observer encouraged them to engage "in untypical or extreme forms of behaviour" (Waddington, 2004, p.161) as a form of 'image management'. Although my main focus during the observations was on one individual participant, I was able to view a number of participants concurrently. At no time in

the extensive period (nearly sixty hours) that I spent in their work environment did I note raised voices or forms of aggressive behaviour. On the contrary, I noted smiling faces when talking with each other and regular laughter. Respect for others and emotional control were in evidence. They truly acted as a community of practice (Lave & Wenger, 1991) and were keen to share their knowledge freely, as typified by the comment from John:

> *"Every day we will go to each other for advice – "how would you do this? You have had the situation before what did you do?" Things like that. It doesn't always have to be in a meeting I suppose, does it?"*
> **No, because I do get a strong sense of community amongst you all**
> *"They will all help you. There is not one of them that won't, they will all help you. I suppose we are all like that, I will help them."*

Maria cited a specific example where she adopted the practice of her colleague:

> *"A colleague shared with me yesterday that she gets her team members to write up their one-to-one notes. I have never done that. That is something I am definitely going to start doing without a doubt. If I thought one of my colleague was doing something really well then I would be completely comfortable with following their lead."*

These examples suggest strongly that the first-line managers operated as a community of practice, an idea reinforced by the examples of collaboration from Philip that illustrates how the team used their complementary knowledge and skills:

> *"One person could be really, really excellent and one thing they would do that, but the next person could be really good at a completely separate thing. So while one person could spend the whole of the day sorting out problems with the computers, the next person could sort out a problem with the process that is causing a problem. The third person could be sorting out a staffing issue, where somebody is really upset and sometimes . . . everybody has got a role, their unique bit that they have which makes the sum of the parts better. You don't try to put your fellow colleagues down - you support each other, you back each other up and by doing that. . . it is teamwork, when it comes down to it."*

During their day-to-day contact, they did engage in idle chit chat, a characteristic of a community, as it "may be just as important to know and understand the latest gossip as it is to know and understand the latest memo" (Wenger, 1998, p.74). But this was subject to control through peer pressure that encouraged them to demonstrate their achievement orientation and conscientiousness in work, as illustrated by Patricia:

"I can go and sit down with a colleague, with a piece of work and talk to her for five minutes about the TV in hushed voices, so nobody can hear us. If another colleagues come up then it is very quickly changed to talk about work."

It was, however, not a totally idyllic work environment. Some expressed doubts about whether they all operated as a community of practice:

"It has not been driven to be a community. That is something that this organisation is keen to drive team leaders to be, a little community. It is very, very splintered within this service." Louise

"The biggest problem I found here is that they are very, very set in their ways. I don't think I have introduced one new idea here, not for the want of trying, because people will not change. People refuse to change. You give me your opinion on something and I might disagree with you, I might agree with you and I might say that is a great idea. In here, that does not happen." Jamie

These feelings appeared to be inner thoughts that were not shared more widely. However, these were two isolated cases, as most participants talked about the collegiate nature of their work. It seemed that they felt a stronger need for group harmony than the need to express their individual negative feelings. Being in a community can however raise other forms of control. In this context, the data suggested the importance of personal presentation to others and how this was adapted in context. This theme will now be examined.

Conform to self-presentation as a manager

All of the participants used a variety of positive adjectives when asked to describe how they wished to be regarded, such as *"approachable", "reliable", "knowledgeable", "trustworthy"*, and *"encouraging"*. The adjective that appeared most often was *"professional"*; it was used eighteen times in the interviews. Some expressed doubts about whether they were actually perceived consistently by others as managers. In response to the question do you feel like a manager here, two participants showed some discomfort when they admitted that they might not be regarded as managers:

". . . tch . . . most of the time . . . yes . . . sometimes it doesn't . . ." Maria

". . . more a supervisor than a manager largely because of a lack of discretion. I'm quite limited in what I can do." Patricia

The participants' sense of self as a first-line manager appeared important and this incentivised them to reflect on how they might be viewed by others, which Maria summarised:

> *"I would hate to be seen as somebody who talks the talk but does not walk the walk. That really bothers me."*

Maria used knowledge gained from a short training course to reflect about the need to exercise control without which she did not feel like a manager. Even in situations where she did not have the knowledge to resolve an issue, it was important to her to be seen by others as the manager, the person in charge. This was consistent with her wish to be seen by her team as *"professional"*. Interestingly, during the observation I saw Maria adjusting the hair of one member of her team and the collar of the blouse of another. Maria recognised that she can, on occasions, be too involved with her team (*"I have realised that I can handhold a little bit"*) and her behaviour be too maternal. The example does illustrate a focus on image and presentation.

In City-Access the standard of dress appeared to act as a regulator to behaviour, as 'smart dress' was a feature of all the participants, which I noted in the observations. Individuals were still free to choose what they wore and how they appeared to others. Fundamentally though, the standard of dress had to be *"smart"*. Lin who had recently been appointed a manager reflected:

> *"Now I'm in the role, I feel that I am not smart enough in my attire. It gives you a lot more confidence. Especially for myself, if I wear certain clothes, you feel different."*

Perhaps she saw the dress standard of others, and felt that she dressed to a relatively lower standard. She certainly observed that a lot of senior managers were very smartly dressed. That point had already been made to me before entering the field by an academic colleague in a general discussion about managers in City-Access. Without asking a specific question, an unsolicited comment was made – "the CEO's female managers all have 'nails'", implying that they paid close attention to their personal grooming and image. Perhaps this was a contextual issue that filtered down to Lin's peers who did take particular care with their image. Presentation as a first-line manager was summarised by Philip:

> *"If you come in and look smart, ready to work, it can be an example for people who may follow without even knowing. It is easy to "do as I say, not as I do" kind of thing, isn't it? So you come in, you are on time when you go to work, you dress smart, you are ready to go.*"

Assimilation

The data revealed the ubiquitous nature of controls that exist in the working environment and which were shown in different forms. Fundamentally, most of the participants, and especially those who had previously worked in other contact centres, recognised a general atmosphere of control as the following example illustrates:

> *"I think the very essence of contact centres is a controlling atmosphere. Again, I keep harping on about this analogy with school, but I think there is a sort of, 'put your hand up when you want to go to the toilet'."* James

Accept the imposition of context controls

Work environment

Figure 4.1 illustrates the working environment. I was not permitted to take my own photographs as the senior managers were sensitive to both client confidentiality through the computer screen displays, as well as their corporate image. The photograph shows every desk fully occupied, but this was not the case on any of my visits. There were unused desks in every team. Perhaps the supplied image shows an idealised view of a busy office without wasteful space. It does not show two features that I believe to be significant as they distracted the participants from their work and caused some anxiety and exerted control. Firstly, the ceiling-level electronic monitoring screen that displays the numbers and type of calls waiting is not shown. When call volumes increase above a limit set by senior management, the data displayed on the screen initially turns to red and as it rises further, it

Image 4.1 Office layout in City-Access

flashes in red to signal that urgent attention is needed. To enable City-Access to respond flexibly and appropriately to the specific nature of incoming customer calls, the knowledge and skills of call advisers are recorded centrally in a database known as 'skills sets'. As the volume and profile of calls change, for example from queries about council tax to refuse collection, calls could then be routed through to those with the requisite skill set to resolve the call.

Most of the participants claimed that they did not 'bother with the display screens', yet one example from John epitomised the degree of control exerted when the display screen flashed red, as it regularly distracted the participants from their tasks as they checked constantly the up-to-the-second status of service demands:

> He also regularly checks the plasma screen –"*sometimes the red catches my eye . . . it's getting busier*", he says. John shows pleasure by smiling when the MIS shows a zero calls waiting. Observation notes

Such a distraction had an effect on John as he commented that working in City-Access *"you just generally feel like you have gone a few rounds with Mike Tyson"*. Two other first-line managers also drew on kinaesthetic language to describe their feelings about job pressures. When at their desks, I observed them speaking sotto voce using pugilistic language, with typifying expressions illustrated by Louise that *"we are taking a hammering on children calls"*, and James who commented *"we are getting battered on everything".*

The second significant feature of image 4.1 is that the corners of the room are not shown clearly. It is here where the Operations Managers sat to give them their controlling 'panopticon' view. The image shows the second floor and the Operations Manager sat in the corner to the bottom left which enabled her to see everyone whilst at work and when staff entered and left the room either at the start and end of the day or for breaks and rest periods.

Individual desktop controls

A second theme of control in learning through assimilation was revealed through an extensive suite of reporting systems on each first-line manager's computer. Although each type of report had to be individually opened for access at the start of each working day, the participants had them all running constantly as minimised icons on the screen desk-top, as I noted in my observation of Christine:

> She has a lot of minimised applications on her computer desktop to quickly flip between applications.

Maria was a skilled user of the systems and I noticed the effect that her regular screen checks had on her behaviour and how she interacted with them:

> Checks the ICT again and talks to the screen *"Oh come on"* but there is no real element of frustration. Observation notes

The practice of continually checking was so widespread that it was noteworthy when it did not occur. During observations I noted that a stimulus for checking appeared to be noise in the room. The sound of call advisers talking triggered the check; it was only in quieter times that concentration could be given to other first-line manager work, as in the example form Trevor:

> It is a quiet time. I have not noticed any check on performance in 40 minutes.

Seating positions

Call advisers were able to exercise choice about their seating location. Although most chose to sit at the same seat, no customisations of the work area, such as family photographs or personal effects were permitted. However, Patricia revealed that the seating position for the first-line managers was prescribed by senior managers:

> *"We are told where we have to sit by the Operations Manager, so it is not something we can choose."*

All of the first-line managers had a dedicated seat at the head of the row of desks to enable them to keep all their staff under constant surveillance. The exception was Patricia, a relatively inexperienced first-line manager. She was the only first-line manager who was instructed to sit in the middle of her team. For part of the observation of her I deliberately changed my position to sit at the head of her team's row, I noted that had Susan sat in the same seat, a supporting pillar would have obscured the Operations Manager's direct view of her performing her job.

Formal learning processes

The final specific form of assimilation was exercised by the HRD function within City-Access. It provided a wide range of learning interventions, some of which were directly targeted at first-line managers. It appeared to operate as a traditional training department (Rothwell,

Hohne, & King, 2000) in advertising the supply of short courses, a course menu rather than being demand-led by staff. The HRD team awaited nominations for course attenders either from managers, triggered by the performance review process, or rarely, directly from those individuals who were keen to update their knowledge and skills. However, of the 12 first-line managers, only three had undertaken formal management development training. This is surprising given that the completion of a 12-month, university-partnered management course is a contractual requirement on appointment, as already noted in chapter four. Two other first-line managers had attended behavioural and self-awareness short courses, but the outcome of these interventions largely just confirmed ideas about which individuals had already concluded: the benefit they derived can be summarised as *it was interesting*. They could not articulate how the learning interventions had contributed to specific knowledge and skills development as a manager.

More generally, the participants' perceptions of the value of the formal HRD provision were limited to two themes; gaining procedural knowledge around people management practices and gaining affirmation and confidence for knowledge that they had already developed through practice. Jamie's view is representative of the value of formal courses, although it must be recognised that he had management experience and had received training from other contexts:

> *"I had a hell of a lot of courses when I first started here, but the courses were mainly around their own processes, so the processes for disciplinaries, the process for absence and grievance and all that, their processes that you have to follow. As a manager, I have not learned anything here I would say I didn't know before."*

Lin, on the other hand, as a totally inexperienced first-line manager gained confidence through the short courses, yet had not attended the 'compulsory' programme:

> *"There are certain areas of this job that I would not be able to do unless I had been on a course – the managerial courses."*

There were even some dismissive comments about attending formal learning interventions. Time away from the workplace appeared to be of greater interest rather than formal learning being viewed as an opportunity to gain knowledge and build skills:

> *". . . it got me out of the office for a bit (laughs)."* Patricia

"The opportunity to be out of the office for a full day would be wonderful. This organisation is I feel partly to blame for this culture, because they do not do anything to encourage people once they have reached a higher grade." Christine

In sum, the context of City-Access imposed a number of constraints on the behaviours of first-line managers which led to them to comply with instructions and standard operating procedures with little if any questioning. First-line managers strived to learn and perform the role undeterred by a combination of both limited structural organisational support for learning and workplace affordances that regulated expressions of individuality. They were in addition subject to further controls which were exercised through people.

People influences

Accommodation

Accede to the powerful

A dominant theme in chapters two, three and four identified power as a pervasive issue in the literature about management and organisations. This was germane to the practices within City-Access as the data revealed many examples of how organisational power directly controlled first-line managers' work. Despite its presence it appeared almost as 'the truth that dare not speak its name'. The participants were not comfortable to use the word power or even discuss its use, as the word in this context was viewed pejoratively, as evidenced by Maria:

What does power look like here?

"I don't even . . . ever think of that word here. Power, it is a horrible word. . . . responsibility is the word I would use . . . and not power. You have always got to answer to your manager."

In a similar vein, Lin shunned from using the word power in City-Access, but was comfortable to use the word control:

"There are people who like control, but that is their personality. My manager is quite controlling, a lot of people see her as quite controlling, but I find her okay because I am the type of person who likes to be controlled in that I have set things to do. I would not use power, not at all."

Susan summarised a general view that did not recognise power:

"I don't think power is particularly used here . . . everybody seems quite reasonable to me really."

Whether real or a 'chimerical control', the Operations Managers did exert power over the behaviours of the first-line managers, one example being the regulation of seating positions. From over 36 hours of observations of the first-line managers, there seemed to be no reason for such a diktat, even more so in the case of Patricia, and it therefore appeared as a gratuitous demonstration of power: Operations Managers appeared to do it simply because they could. As all of them sat in a corner position they were able to have a panopticon gaze. In one observation I noted:

> Jamie discusses the late arrival of a TM after a dental visit with the Operations Manager. He observed that she had noticed the late arrival and actually goes over to explain without being called. He is sensitive to the eagle eye of his manager and this triggers his behaviour.

Despite a legitimate reason for lateness by a call adviser, Jamie proactively informed the Operations Manager so that both he and the adviser were not criticised. The sense of fairness was extended further into a need to protect call advisers from control by the senior managers. Indeed, the first-line managers found themselves positioned in a hierarchical 'squeeze' position between their direct reports and their line manager. They absorbed pressure from above and below their level of operation, as Jamie illustrated:

> *"As team leaders, I think we have got the worst position as the team leader is getting it from the Operations Manager above, and the call centre manager and the call advisers below. We are right in the middle and it is the shittiest job I think you have is a manager."*

Patricia recognised that Operations Managers themselves were similarly positioned between different levels of people. Whilst she accommodated the behaviour of her manager she was not interested in promotion:

> *"It just would not suit me at all doing the Operations Manager job. She has to be polite too much to people who she would rather not be polite to I think."*

James provided a useful, less emotive contribution of the prevailing view that despite pressure from 'below', their role required them to protect and defend individuals in the team from the Operations Manager:

> *"Wanting to defend my team . . . that is my initial reaction . . . innocent until proven guilty, rather than the other way around and I always look for the best in people. I'm talking more about*

protecting people, so I feel sort of an affinity towards them, and . . . to defend that individual, be that against a customer allegation or comment, or a manager."

These views were, however, moderated by a sense of 'doing the right thing' and fairness, two of the values learned in stage one of becoming a first-line manager, formative development. Philip illustrated this and added a nuance to suggest that the motives for such behaviour were not entirely altruistic, but included self-preservation:

"Obviously if it is bad then that can't be defended because you would sound ridiculous. I'm defensive of them because, one, it is human nature was also if you are there, it is your team. If they [senior management] say anything to you, you are being told that your team is not performing, by default, you are not performing."

Despite the denials of the existence of power, it was further evidenced through practices associated with organisational politics (Meisler & Vigoda-Gadot, 2014). Maria recognised power games that people played with the comment *"we do have office politics, we are not perfect".* Philip thought politics was something bad and actually unhelpful when seeking cooperation from staff. This point was reinforced by Louise who illustrated the instrumental nature of the relationships with senior managers whose only interest was work priorities:

"I actually like my job, It's just like always the politics, but that is in every job isn't it? I don't like it when the chief executive comes down the stairs and I call him the stealth bomber because he just appears on the floor. He doesn't come over and go "hi", he is just there, this person standing there behind you. He will ask very direct questions about what is going on but he wouldn't go "hi Louise", because he does not know me from Adam."

Notwithstanding the tacit recognition of power, and that power came through management structures, none of the participants considered themselves to be powerful as first-line managers. They felt that their role had been emasculated, demonstrated by the comment from Bob:

"I think what they have done is stripped a lot of the power out that this level of management if I am being honest with you. We can't hire and fire, we can't discipline, we can't make the fundamental decisions to move things further forward. We have to review to a third party and they make the decision and they review your work."

James felt that his current position was in some ways a retrograde step due to him handling a reduced range of activities:

"I had more responsibility at a much lower grade, going to court and doing all kind of different things, interviewing people, and all of that has sort of ground to a halt. I really feel that I have got less responsibility than ever."

This was a surprise to him as he expected increased responsibilities would be associated with a manager's role. He was frustrated that the tasks that he no longer handled but had previously enjoyed had been replaced by others which were not challenging.

Another example from Susan was particularly revealing, as it showed the very limited authority permitted in the role and perceived negative consequences of using personal discretion:

"If someone comes up to me and asked me a question I'll go [she pauses and looks around]*. Instead of being able to sort of think through myself, I have to say 'I'll get back to you on that one' - then off to my manager, which doesn't give me much control does it?"*

Why not take a decision?

"I did yesterday and I'll let you know how I get on with that (laughs). I am awaiting a strongly worded e-mail back. I feel like I can't do a single thing without checking it with my manager first."

Interestingly, whilst the first-line managers did not feel powerful, they considered that their support staff did have the ability to exercise power over them, as Susan explained:

Do you feel at all powerful?

"No (laughs), not at all."

Are your team powerful against you?

"Yes."

But you do not feel powerful over them?

"No . . . I just need to feel in control of everything I think."

In discussing power, most, like Susan felt *powerless,* but were more accepting of control, the dominant theme identified as a contextual influence. James agreed, but his acceptance that control is an issue was expressed almost with resignation:

"Ultimately I do not think I am very powerful."

So power isn't really a big issue in here?

"It might be, but it is not for me."

Is control an issue?

"Yes."

Aspire

Accept restrictions on personal choice

The discussion on people influences thus far has characterised the inescapable controls that exist to govern how individuals learn to become a first-line manager. This raises an interesting question about how the exercise of personal agency might help an individual in learning to become a first-line manager. Notwithstanding such controls, the data pointed to three areas that presented opportunities. All of the participants admitted that when making inexperienced judgements using their discretion they had made mistakes. Secondly, a limited number of the participants did find some occasions to assert their individuality, albeit this was to a very limited degree and concerned the personalisation of work space. Finally, most of the participants exercised control over their work to avoid criticism from the Operations Manager.

Limited use of discretion

Exercising choice over their actions through discretion has led to the participants making mistakes in their job. Susan was embarrassed when discussing the case of a staff member who instituted grievance procedure against her for perceived unfairness in swapping a call adviser's shift. Her Operations Manager told her "you can't do that", only for her to reply *"I didn't know"*. The Operations Managers seemed to deny any opportunity for the first-line managers to use their judgment with their call advisers, a painful mistake from which Patricia learned:

> *"I told my manager that* [a member of staff] *had taken half a day's leave because she's feeling sick and her reply was "You have done what? If somebody goes off on sick that is recorded as sickness". I hate looking like I am stupid, I* ***hate*** *that, because I am not. That only occurred because I had not been told that and I had not experienced that before, but the mistake would never happen again."*

Jamie too did not enjoy making mistakes, but recognised the potential for a positive outcome:

> *"I will learn from the mistakes that I make because that is the only way you do learn I think."*

The notion that exercising discretion through work experience can support learning was provided by two eloquent illustrations:

"I think you can't teach someone to be a manager; you can develop someone's skills and personality more than teach it. There is not a book that you can write that would say "if managing person A . . . use paragraph 1". . .there is the personality side to it." Philip

"You kind of learn that, you know, what is acceptable and what is not as a team leader." Louise

Moderate displays of individuality

The expression of individuality was only shown by two participants through attempts to sabotage the senior management instruction not to customise the work space. The observation of Patricia provided an interesting example of a first-line manager resisting such management controls by making changes to her email settings:

> The font on some e-mails is in pink, and some screen backgrounds are also pink. Patricia says that she is a 'girly girl', always has been, and always will be. Given the absence of desk personalisation, she feels this level of customisation is important to her.

Patricia's computer screen was however, largely hidden from the Operations Manager's view. As such, her customisation was not a bold expression of individuality, perhaps because her need to please her manager, or at least not have a confrontation with her, was stronger than her need for self-assertion. She did not use pink font when replying to her manager, but explained:

"It is just a little bit of me so when I send out an e-mail they know that she is a girly girl (laughs). It is just a little bit of me that is allowed to escape into the ether".

In contrast, Louise as noted previously, was a more experienced and self-confident manager and had no such qualms. Her individuality was shown with extensive desk customisation by adding a number of personal items - hand cream, toy ambulance, little teddy bear, fancy storage pot, non-City-Access calendar and coffee flask. Her manager did not challenge her about this. During the post-observation discussion it became apparent that this was a conscious choice on her part. She showed self-confidence with the comment *"You are not supposed to* [have desk customisation], *but what the heck, you are there for a long day*".

Exercise control over own work

The third opportunity to demonstrate how to aspire to be a first-line manager was shown through exercising control over work. As John explained:

"I like to be in control - I suppose I am a bit of a control freak actually. If I am behind in my one-to-ones and stuff like that it plays on my mind and I will need to be in control, or get back up to date. A bit of the OCDs I think. I think every manager has got a bit of the OCD about them (laughs)."

Being in control was not only a key feature of the working environment, but it can be traced back to the need for individuals to take personal responsibility, a characteristic that was learned in the occupational development phase. Jamie was even more blunt in describing the exercise of his control without any misgivings:

"That little overt shadow is always there, but it is, because if I did not pick up on something, my manager certainly would, so who gets it in the neck then? Then I give it to the advisers because shit rolls downhill I am afraid."

He discussed how he has reported back to his manager following such action, which points to a need to please superiors. Most of the participants, however, did not adopt such directive approaches as they would not have been consistent with the behavioural values of emotional awareness and fairness that had been learned earlier. If they did not enjoy their treatment by the Operations Managers, they did not consider it appropriate to mete out similar action towards the call advisers, accepting their 'squeeze' position identified earlier. They moderated their reactions so that their behaviour was seen to be consistent and not subject to an immediate reaction after harsh treatment by the Operations Manager.

Separating work from home

The final area for the exercise of individual agency occurred as the first-line managers discussed a need for separation from their job role. Using the analogy of the Venn diagram (cf. figure 3.3, identity 'at the intersection') in interviews, I asked each about the degree to which work overlapped with their personal lives. Patricia recognised her life priorities were not focused on work as she recognised its economic necessity:

"Although I don't particularly enjoy my job, in my life I am happy. My job is a very small part of my life."

Maria was sanguine in not permitting the mundane activities in work to interrupt her life outside of work as she assumed that others wold not be interested:

"I'm not one of those people who say "oh today we had this woman on the phone . . .". Only if something is out of the ordinary then I will go home and I might say to my husband about that day but . . . I'm sure it would bore them senseless if I told them."

They sought ontological security and contentment by keeping part of themselves outside of work. I problematised a colloquial expression by asking each of the participants "are you in a 'good place'?" There was general support for being content, typified by Trevor in the following example:

"I'm really happy the way things are going work-wise, home-wise."

The values learned in formative development of being rewarded for working hard helped the first-line managers to live the life of their aspirations, although two participants still sought contentment, possibly due to them being relatively new to the role:

"I think I am making the best of things; this is what you have to do isn't it?" Susan

"You can always be better, can't you? You can always improve, you can learn new skills. You can always earn more money, you can always be happier." John

James was more reflective and felt that he may be underachieving in his career. I wondered whether this issue bothered him *enough* to warrant a change in his behaviour, although this may have been due to the effects of current work pressures:

"I think I am comfortable in the way it comes across to the team that I manage. I am not so comfortable in the way that it is viewed in higher management than by myself. I think it has stood in my way to progress. I mean I'm not like desperately unhappy or anything, It's just . . . work-wise . . . I feel like I have sort of been in that role too long."

Most thought this was unproblematic, typified by James:

"To be honest I don't think I am dramatically different outside of work than that in work. Maybe that is part of the problem, maybe the sort of er, you know, maybe I should adapt a more . . . I don't know. It is difficult to answer."

The only participant to express lack of contentment in the job was the most experienced first-line manager. Interestingly she is the only first-line manager who could be described in the lexicon of situated learning theory (Lave & Wenger, 1991) as being in a position of mastery. Christine seemed inured with her job almost to the point of testiness. As with James, she

had witnessed younger individuals taking on the first-line manager role and being offered formal development opportunities that seem to have been denied to her. Christine had learned to become a manager almost exclusively through her experience and saw little potential for further career progression. Her frustration with the lack of opportunity to exercise discretion led her to comment:

> *"I think I am fed up with having staff now because now, compared to being a manager 10 years ago, [sighs] how can I say it, staff . . . you have got to kid-glove them too much . . . they ring in sick because they have got a headache – I want to tell them "get your bum into work and I will give you some paracetamol", you know. Everything is back off, back off in case . . . I don't think people value their job anymore, I really don't."*

Perhaps, also like James she has been in the role too long and needed fresh challenges that appeared to be not available. She was however relaxed about her life position. She did not enjoy her job, but recognised its economic necessity. Her work did not appear to be understood and recognised in her home life, poignantly illustrated by her remarks about her husband's views:

> *"Because he really thinks . . . well, this is just my little job as far as he is concerned, this is just my little job, I sit on my bum all day, it is just an office job – oh yes, that is all I do."*

She was clear that work overlapped with about half of her life and although she was comfortable to talk about that, she did not expand on her aspirations outside of work. She agentically kept that private which was consistent with her youthful confidence to be different and not conform. Christine did not feel the need to answer all of my questions.

In sum, restrictive forms of control do exist in City-Access. Intriguingly, most of the first-line managers discussed the pleasant nature of the work environment during the interviews, and accepted that some controls were necessary but not intrusive. This was contradicted by data from the observations that showed that control is not a chimera, but was very real and pervasive. The participants drew on their public sector work ethos, which was copied by those on private sector contracts which appeared to encourage them not to complain but to support the service. Perhaps also, they wished to deny that they are subject to such stringent control as this may have affected the image they have of themselves as an individual first-line manager in front of their team and to outsiders, such as a doctoral researcher. The learning content is summarised as table 6.10.

Table 6.10 Summary of learning content in four learning modes

Assimilation	**Adapt**
Accept work controls	Resilience in dealing with the dominant culture
Absorb context controls into daily work	Learning to fit in at work
	Learning to fit in as a manager
	Conform to manager-presentation standards
Accommodation	**Aspire**
Achievement drive / 'Doing the right thing'	Potential to make personal choices
Emotional awareness	Experiment with personal boundaries
Self-confidence	The requirements to be a first-line manager
Achievement orientation	
A sense of equity	
Learning about being a manager	

Identity in manager development

The questionnaires asked the participants 'When did you first feel that you were a manager?' This produced a wide variety of responses. For some, it was in a previous organisation, but for those who responded about their experiences in City-Access, the data revealed two broad themes. Some recognised themselves as a manager immediately on appointment due to specific situations that required them to exhibit manager action, which are illustrated by the following diverse situations:

> *"First day, as I was responsible for team and performance."* Lin
> *"Pretty much straight away. I wanted to make sure I got a handle on my role and responsibilities as soon as possible. I really don't like not being able to do what I'm supposed to be."* Trevor
> *"On my first day actually, when I was threatened with a grievance."* Louise
> *"I had to 'let somebody go'- an agency worker who made a mistake on an invoice. The client demanded serious action was taken."* Maria

For others, their sense of being a manager evolved more slowly and their eventual realisation came from experience:

> *"When I'd gained respect from staff and colleagues."* Jamie

> *"Over the past two years as I feel fully competent in my role and have gained the experience to deal with managerial issues such as staffing - I have grown in confidence as a manager"* Patricia

> *"I have started to feel more of a manager over last eighteen months, this is because the management structure has changed in the service, I feel more supported in the role. I also feel experienced to deal with situations that arise."* Susan

Although John had no difficulty in expressing his sense of self in formative development, as a first-line manager he encountered a situation that left him bemused. A management course that he attended included a session on self-awareness. The trainer said to him:

> *""There is something about you . . . which I find hard to put my finger on . . . you don't let people in." Maybe she is right."*

John had learnt to keep part of himself private as he felt a more controlling culture in City-Access with the comment *"in here I suppose it is more reserved"*. The context of City-Access and its pervading controlling culture had had an effect on him, in contrast to a previous job where he described how he

> *"was right out there and I let everybody know about me and what I do and going out after work, my personal life and everything. Everybody knew the ins and outs of my life."*

The earlier comments by the participants about being in a 'good place' suggest that they were content to identify closely with City-Access, exemplified by Maria who commented

> *"Why traipse into the job every day and you think "I hate this place" and then go home and . . . no, no, no that would be crazy."*

The one exception to this was Christine. Of all the participants, she saw a clear separation between her manager and home identities, yet she was very guarded in what she was prepared to reveal:

> **So what stays outside work?**
> *"Me - I stay outside work."*
> **And what does Me look like?**
> *"Now then, if I tell you, then . . ."*

6.6 Chapter summary

This chapter has used the three stages of development to present the data about learning to become a first-line manager in City-Access. It has identified specific detail issues that

influenced learning, structured and presented using the conceptual framework from chapter three. It has revealed data relevant to the four research objectives shown in chapter one:

1. Clarify the nature of the first-line manager role in a specific contact centre
2. Identify how individuals learn to become a first-line manager
3. Discover influences that affect learning to become a first-line manager
4. Examine links between learning and identity

The next chapter will explore meaning from the data in greater depth.

CHAPTER 7 IMPLICATIONS OF THE ANALYSIS

7.1 Introduction

Having presented the research interpretations in the previous chapter, this chapter will explore the key themes that emerged from analysis of the data and which resulted in the theoretical frame for analysis. Initially I shall analyse the three stages of development, formative, occupational and manager, to show how forms of control which were identified in chapter two and illustrated in the data analysis increased throughout the participants' lives. Vignettes from an individual first-line manager's view will illustrate a specific feature of that control. The three stages of development will be shown to illuminate how individuals progress from legitimate peripheral participation to mastery – a notion that is undeveloped in situated learning theory (Lave & Wenger, 1991). This will lead to an examination of the effects of learning on identity. The chapter will conclude by revisiting the conceptual framework introduced in chapter three as figure 3.3, and used to structure the presentation of interpretations, to consider its utility as a lens to explain the stories of how an individual becomes a first-line manager.

7.2 Learning in stages

Formative development

Context influences

There was little meaningful data about contextual influences, and these were limited to very brief comments, almost in passing by fewer than half of the participants. What was suggested referred to limited needs to *adapt* to others, and as there was no context they had experienced beyond home and school, there was no *assimilation* to standards. The two references to religious values in this study were metonymically consistent with family values, a people influence. When discussing school, there were no allusions to the idea of "school as a structure" (Etzioni, 1982, p.184) and the controls and disciplines that might be imposed. It was the influence of teachers that predominated. The absence of noteworthy issues suggested strongly that context influences in this stage were not significant.

People influences

The first stage of development is characterised by the dominant influence of "significant influencers" (Lake & Eastwood, 2004, p.1); in this context parents and teachers. Each participant recognised the fundamental contribution that early life experiences made to the

development of crucial skills and values that would be important in working life generally and as a first-line manager. The attributes learned, which were summarised in table 6.4, were 'life skills', which enabled the participants to negotiate future life situations with success (Danish et al., 1993). 'Life skills' acted as the learning curriculum for apprentice managers. As these skills were learned from or perhaps 'bestowed' by parents and teachers, the participants in this study appeared to lean towards the 'nurture' view of personal development rather than 'nature'. This contradicted the view expressed in chapter three that neither theory predominates in the case of manager development (Sameroff, 2010). Exposure to the behaviours and values of parents and teachers offered the participants a blueprint to be a first-line manager in City-Access.

Of these two groups of 'significant people', parents had the majority influence, revealed in around two-thirds of the data. Fathers were seen as more adventurous and prepared to consider risks by their children of following career paths that were novel and untested, or even precarious in Louise's case of considering art as a career encouraged by her father. Mothers were seen as more conservative as they focused on the economic necessity to ensure continuing income. Some of the mothers were also more cautious in areas of career advice, possibly due to their lack of experience of paid work as 'stay-at-home' mothers. As a population, only 46 per cent of women of working age were in employment in 1959, but this grew to 66 per cent by 2012 (Philpott, 2012). It may also have been due to an inability to voice their opinions, possibly out of deference to the children's' fathers, or even a lack of confidence that social mobility is "not for the likes of us" (Bourdieu, 1984, p.471).

The influence of teachers on individuals becoming a first-line manager was significant and is under-researched in the literature. The participants largely acquiesced to teachers' behaviours and values in the same way that they did with their parents. Teachers encouraged their pupils to develop a strong sense of achievement and to experience a link between effort and reward. They also showed that behaviour could potentially have negative consequences and they needed to conduct themselves in a manner that was sensitive to the feelings of others. This early form of training was an important 'life skill' that reinforced and consolidated the social skills that were initiated by parents. In observing their teachers working hard and displaying consideration for others, they were exposed to adult behaviours that they could model, further developing their emotional intelligence in the area of conscientiousness and sense of fairness. This illustrated the emulating form of role modelling discussed by Cheetham and Chivers (2001) in chapter three through which an individual copies the behaviours of others. Emulating or copying a behaviour can lead to

acceptance by others (Lawrence, 2009) and a sense of belonging that can engender feelings of security.

Literature has noted that managers can act as a parent or teacher figure (Wissema, 2009) and that an increasing part of a first-line manager role is to instruct support staff (for example, CIPD, 2007; Saggers & Saroyan, 2012), but not how teachers have influenced future managers. Teachers rewarded their pupils for displays of 'correct' values and behaviours, and this affirmation gave the participants' confidence to use their skills in future situations. Acceptance by and tolerance of parents' values by younger people could be expected; parents had provided every experience for their infants and had passed on their values. Teachers, however, were the first adult figure outside of the family whose behavioural standards the participants wished to *accommodate* as was seen in the case of Patricia.

Control over choice in and methods of work was not necessarily a negative influence. The values provided by parents and reinforced by teachers supported personal emancipation as it set limits to the acceptable expression of ideas and the acceptable exhibition of behaviours. True, unrestrained freedom to act is perhaps illusionary as others may be affected by the behaviour. As Haller & Hadler (2006, p.170) identified, "for thinkers from Aristotle up to the early modern age, individual happiness was closely connected with the social order". Although there is no universal agreement about the constitution of "the social order", it concerns established rules. The behaviours and values of parents and teachers could be considered 'rules' for *accommodation* by their children that leads to reduced conflict and equilibrium. Anderson (2005, p.376), however, suggests a more pragmatic motive to maintain *accommodation* by suggesting that "one of our incentives to obey [rules] is the assurance that others will do likewise". Without this sense of equity, Anderson posits that a wrongdoer benefits by the acceptable behaviour of others around him as well as any selfish gain as a product of pursuing a personal agenda. 'Doing the right thing', such as learning the rules, was a guiding principle of this first stage in development, exemplified by Philip. Understanding the rules appeared to reduce the need for young people to seek pre-approval for their actions. Acting in compliance of the rules possibly garnered confidence for individuals to be secure about their behaviour in new situations and in consequence to express their own sense of self.

In vignette three, Maria revealed how she used behaviours and values learned in formative development in her first-line manager work. It illustrates how her sense of self-control influenced her image as a first-line manager. This was important to her as she was very

aware of her self-image – she wanted to be seen as a manager and the effects of her behaviour on others. These attributes were directly traced to the influence of parents and teachers.

Vignette 3 **Accommodation –** ***"does the tiger look in the mirror and see a cat?"*** **Maria**

I asked Maria "do you feel like a manager"? She hesitated for some time and eventually responded with ". . . tch . . . most of the time yes. Sometimes it doesn't . . ."

When she felt like a manager she dealt with her staff with sensitivity avoiding an immediate and possibly emotive reaction to a situation. She preferred to allow any feelings to dissipate as it gave the call adviser time to reflect on their behaviour. She spoke about her ability to 'do the right thing' and her emotional control as attributes that came from her mother and her teachers.

Maria illustrated her point with an example. After a long call when she noted that an adviser's voice was raised, she merely enquired sympathetically "are you OK?" With a working knowledge of her staff, she believed that asking such a question would make the adviser reflect that the call had not been handled correctly. As the adviser's formal review was planned for the following day, Maria started that meeting with the comment *"I am going to take you back to that time, please tell me how you thought that was appropriate".* It was important to her to be in control of a sensitive situation that may lead to defensiveness or resistance from the call adviser..

Maria believed that being a first-line manager is substantially down to personality. She has explored her understanding of personality in a training course where she discovered ideas about the Johari Window (Luft, 1961) and self-image. Using the cat / tiger analogy gave her a framework to understand the values she had developed in early life, which regulate a tendency she revealed to use her *"gut instinct"* and occasionally *"flying off the handle"*.

She felt the need to be in control and take charge of situations, without which, she did not feel like a manager. She was sanguine enough to laugh when discussing problems that are caused by the computer systems; they did not cause her anxiety. Although she did not have the technical knowledge to resolve such issues, she still stood behind the adviser observing what was (not) occurring *"but I am not actually doing anything. I just go over and look at their screen".* Acting as a manager was important and this was extended into matters of personal presentation.

Maria did not enjoy the occasional 'dress-down' or homeworking days as she felt that they did not support the presentation of a professional image of her as a manager. She wanted to control how "the mirror" reflected her image and the kind of 'animal' that others perceived her to be. Her lack of absolute control perhaps explained her initial hesitation about feeling like a manager.

The second people influence in formative development was the self, but this was much reduced in relation to parents and teachers. Each of the participants had the potential to make their own choices about their future lives, yet such expressions of independence were limited to Christine and Jamie. The others *aspired* to exciting future occupations in contrast to the lives of their parents; heroic figures from literature or television allowed children to envision a romanticised future. Others sought more visible occupations such as lawyer or teacher. It is unsurprising that none wished to be a manager. However fanciful their career dreams, they all reflected the practical realities of getting 'a good job' and earning an income as an independent person. They appeared to seek approval for their actions as a desire to please, or at least to avoid confrontation with authority figures. This could have been due to a lack of personal confidence or even a feeling that it would be too troublesome to act

against the wishes of significant others. Whatever the reason, each participant accepted controls by others as a natural state and showed no sustained form of resistance. Limits to personal expression are presented in vignette three as Maria found it important to present her image as a manager through her dress.

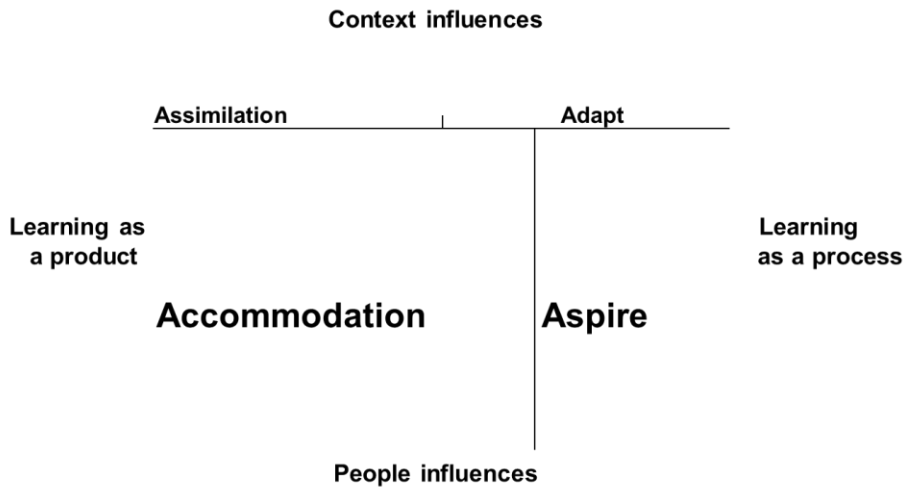
Summary of formative development

Accommodation in formative development began the process through which individuals learned identified behaviours that started the pathway towards their becoming a first-line manager. These attributes were:

- Achievement drive / 'Doing the right thing'
- Emotional awareness
- Self-confidence
- Achievement orientation
- A sense of equity
- Potential to make personal choices

and they remained with the individuals through to the second phase of becoming a first-line manager, occupational development. In this first stage, none of the participants expressed a view of their future job as a manager. The wishes of the participants to use their agency to *aspire* to a future life was, for the most the part taken from the authority of teachers and parents, and the *accommodation* of their values and behaviours. As such, it raised questions about the appropriateness of the conceptual schema used for data analysis in figure 3.5 as the four evenly divided quadrants do not represent accurately the interpretation.

Figure 7.1 Four modes of learning in formative development



This is corrected in Figure 7.1, which shows more precisely the reduced influences of the context and own agency and the dominance of *accommodation* of the learning agenda proposed by significant others. As a series of rules, this agenda is a product to be learned and followed.

Occupational development

Context influences

The second stage of development showed a small increase in data from contextual influences. They were limited to Susan *adapting* her behaviour to fit in with the prevailing work culture and Maria's *assimilation* of any form of control and working conditions to earn a wage. The imposition of controls was to be expected in a relationship built on an instrumental exchange of labour for payment. In occupational contexts, reward is conditional on performance, and has led to codification of expectations through contracts of employment and clarified further through job descriptions and person specifications (Taylor, 2014). Such controls are seen in daily operation at work as identified in chapter two and in City-Access through supervision and performance review processes, and periodic 'one-to-one' sessions.

However, by using abductive reasoning I suggest that *adapt* and *assimilation* had even more of an influence than manifest by analysis of the data. The management literature is clear – work imposes constraints on what employees do and how they do it. As the participants had learned a 'drive for achievement' together with a 'sense of equity' (a *"fair day's pay for a fair day's work"*, Philip), they would tolerate most forms of control in the employment exchange. Perhaps the reason it was not reported more widely in the data is that control was seen as entirely natural. They may not have recognised the degree to which impositions at work controlled their lives, which limited choices they could make, yet the controls existed. Control at work may have been seen simply as an extension of the ordinances at both home and school.

The dominant influence in the second phase of development followed the experience in formative development – people.

People influences

Occupational experience exposed the participants to managers supervising their work. These managers became the 'significant people' who required *accommodation* of their wishes, as they exercised control over their staff. This became an important experience for

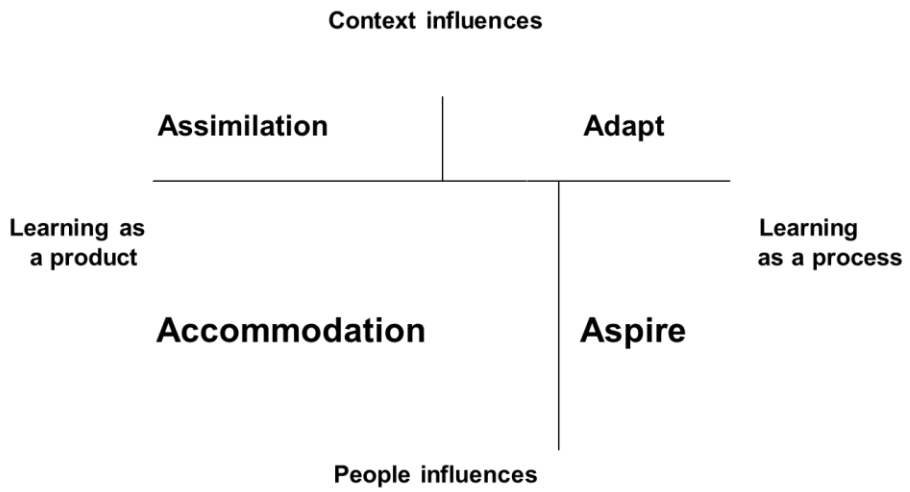
the participants as their reactions to this first-hand experience provided choices for the participants to *aspire* in their future as agentic first-line managers. What they learned in a positive sense were key values and behaviours of respect for others; communicating in an appropriate and timely manner; and to liberate staff to explore their potential. These experiences were recounted with warmth and affection, especially respect, as this was a recognised value that they had learned before starting work. Observing another person adopting this value further affirmed its utility. The negative behaviours of their managers acted as "a role model in reverse" (interview with Philip). When describing behaviours that challenged what they considered to be acceptable, they used stronger emotive language such as *"bitch"* and *"hate"* and even *"Margaret Thatcher"*, a reference to a former UK prime minister who was associated with a domineering, hectoring style of management. Values and behaviours that were contrary to those that had been developed up to that point in their lives were rejected robustly as they threatened the view of the world that had been developed. Perhaps too it suggested some independence as a person in that they felt confident to use their agency to challenge others.

Accommodation of the behaviours of managers in this second phase was not, however, accepted unquestioningly as the participants exercised some agency. As early professionals, they experimented with personal boundaries, particularly with their confidence about what they felt was achievable as revealed by Christine and Bob. They reviewed what they observed against their formative values and made careful choices about the behaviours to add to their repertory of attributes. This illustrated the synthesizing form of role modelling (Cheetham & Chivers, 2001) whereby individuals identify with another and take an eclectic mix of attributes. Working for and with others developed further what they had learned formatively about the need to be tolerant and that life was happier in harmony without disagreements and challenges. Had they reacted against authority, they would risk losing their job and in consequence affording the lifestyle to which they *aspired* as agentic individuals, and which most enjoyed. At a time in their lives when few had ties from domestic responsibilities of caring for children or ageing parents, most felt free to explore different career options without risk. Greater experiences of different contexts appeared to provide rich experiences as a second phase of the apprenticeship to become a first-line manager. The exchange of labour for pay, and enjoying the economic benefits, for example, Bob's comment about *"houses . . . cars and all that"*, together with the social status of a manager, meant that there was almost an inevitability that the participants would *aspire* to the role of a first-line manager. After all, the ingrained value of 'getting a good job' would drive them. A manager position would give them the opportunity for personal recognition and it would please their parents and teachers, who could be proud of their achievements.

Summary of occupational development

The second stage in development, as in the first, was influenced to the largest degree by people controls – managers. There was a small increase in data about influences from the context, and I suggested that this was greater than reported. However, the imposition of controls was not problematic to the participants as they followed direction from earlier in their lives. The exercise of agency remained relatively subdued, although clearer ideas about their future had started to emerge and being economically independent gave the participants some freedom to choose what they enjoyed in life. These factors indicate that Figure 7.1 needs further refinement to reflect these subtle changes and this is displayed as Figure 7.2. Learning as a product still appeared to be the more dominant mode.

Figure 7.2 Four modes of learning in occupational development



Manager Development

Context influences

In this third stage, the context assumed a further increased influence over the first-line managers through an increase in the range of controls. Some of these controls, such as the use of performance management processes were readily acknowledged by the participants as they had been experienced previously. Other forms of control, such as workplace affordances were either not recognised as limitations to act, or their effects were understated.

The office environment appeared, superficially at least, to be an attractive place to work. The place was always tidy, there were large pictures hanging from the walls, good quality furnishings were provided and each floor was bright and airy. The only exception to this was the ground floor that for reasons of security and client confidentiality had frosted glass. It was rather dark and needed fluorescent lighting to be able to work and received negative comments from those who worked there. However, the layout and fittings all suggested the presence of control, illustrated by a number of affordances; the standard seating office layout with the regimented nature of the desk 'lines'; the uniformity of the work area on each floor; the ceiling level display screens; and rigid shift patterns. Even access to each floor required a security pass which recorded the instances and timing of staff movement. Supervision of first-line managers was undertaken by an Operations Manager, each of whom sat in a corner location to be able to survey all activities. Their positioning was reminiscent of a raptor sitting quietly waiting for an opportune moment to pounce, yet none of the participants recognised this as a limiting control.

Although it was noted earlier that there was a more relaxed approach to performance management in City-Access than in other contact centres, nevertheless control was a key feature and is illustrated in vignette 4. Louise had a keen awareness of the pressures imposed by her manager yet had the confidence to question increasing workloads when this became unmanageable. The *assimilation* of protocols into her practice, such as senior manager meetings and the numerous performance review processes for call advisers, were imposed without a consideration of the effects on first-line managers' workload. They were challenged to balance the occasionally excessive demands of senior managers with the limitations of their support staff. For example, writing a report with a short deadline for a senior manager would remove the manager's availability for helping call advisers with queries that they could not answer. In Louise's case, despite efforts to check her use of agency, she still felt able to maintain her sense of self.

In table 4.4, the timing of activities prescribed for first-line managers was listed. This resulted in nearly forty required actions per month, around ten per week that have to be reconciled alongside support for the call advisers. Despite these constraints, no complaints by the participants were revealed in the data. Perhaps the control removed the necessity for them to think for themselves and decide what action to take. When they complied with instructions, they simply followed a pattern that had started in their formative days of 'doing the right thing' by the standards of 'significant people'.

Vignette 4 **Assimilation –** ***"You have got to drive performance"*****. Louise**

Louise was one of the more experienced first-line managers. Her quiet disposition belied a resolve to do and be seen by others to do her job to the highest standard. She wished to perform her role in such a way that it did not stifle her staff, *"give them a bit of room, you know, to breathe"*, yet was acutely aware of the ubiquitous operating procedures in place. These controlled most aspects of her first-line manager role. She accepted the limitations of her role with equanimity – she acknowledged those accountabilities which fell within her remit and did not worry unduly about the responsibilities of her senior managers. *"Usually I am juggling so many things, everyone wants a piece of you . . . . then I have to sit down and really prioritise my day"*. She had learned to approach work in this way as she was keenly aware that over-stressing about work issues could lead to ill health.

Louise felt that the practice of senior managers meeting regularly (without her and her colleagues necessarily understanding why) placed additional pressures on them to write preparatory reports to very short deadlines. She used her well-developed sense of 'doing the right thing' to follow what she believed to be the true purpose of her job, not just serving a bureaucratic process and *"trying to make it a positive place to work in"*. She illustrated this further with a telling example: *"If we delay anything then you are potentially putting that person at risk, a child at risk"*. She had not written a pre-meeting report on one occasion as she focused on what she believed were her priorities – the call advisers dealing with the public, and dealt with the expected criticism with equanimity.

Louise recognised that such a stance exposed her to being perceived a less-effective manager, as there are other colleagues who continue to acquiesce to unreasonable demands for additional work. She did not allow this to affect her, as she recognised how to retain a sense of proportion between the requirements of policies and performance targets, and what is actually achievable. Life skills had taught her the values of consideration for others which help her to get the best from her team. She did not see the need for work *"to be so tight, tightly controlled"* and is sufficiently confident to assert her sense of self. There may have been *"no flexibility"*, yet Louise showed her individuality with some desk customisation - hand cream, toy ambulance, little teddy bear, fancy storage pot, calendar and coffee flask. Her defiance against the policy not to personalise the workspace was not challenged by her manager. Without the challenge, the number of items seemed to grow . . .

There was widespread support amongst the participants for the idea that they behaved as a learning community. There were only two dissenting voices to this, yet their practice, both self-described and observed suggested that they too behaved as a member of that community. Learning was shared amongst peers as the participants *adapted* to the culture of City-Access. The first-line managers were regularly observed seeking advice from colleagues that drew on their specialisms. For example, Christine had specialist housing knowledge and James had experience of working in refuse collection. Although they did discuss the operation of 'office politics', they did not provide specific examples as illustration. It would be a rare workplace of over one thousand people to find no instance of an individual pursuing a personal agenda that in some way was to the detriment of other workers. Either the participants felt a sense of loyalty to City-Access and their colleagues in not revealing the examples to an external researcher, or, as I am more inclined to accept, the context generally did have a collegiate culture. Whilst formal learning was useful for specific aspects of practice, such as dealing with staff disciplinary interviews, it was often delivered after a situation had been experienced, so it was of limited value when actually needed. A key contributor to learning to become a first-line manager was peers. Colleagues even

influenced the standard of dress as each participant spoke about the need to present a professional image not only through their behaviour, but in the standard of attire. Lyn worried that she was not smart enough, but the need to dress in the image of 'an ideal manager' was strong. This was curious as the first-line managers were not dressed to an obviously higher standard than non-managers or a lower standard than senior managers. Without the evident clue of seating positions, I was not able to single out the first-line managers. All staff dressed to a good standard, typically not in jeans and tee shirts. As the practice of *adapting* to the context was universally embraced by all participants, there is no exemplifying vignette for this influence. The enhanced pay, relative to other contact centres enabled all staff to afford to dress to a good standard.

People influences

The dominant influence in manager development, as in the two previous stages was an *accommodation* of 'significant people', in this case the Operations Managers. They exercised sovereign authority over their support staff and used power that attached to their elevated status. This power was a principal feature of how control was observed in City-Access, yet the participants were reticent to discuss it and the emotion that accompanied their discourse about the word 'power' was surprising. Whilst the participants were content to use the word 'control', 'power' altered the rapport in the interviews as most physically stiffened up which restricted the flow of the conversation. Yet the exercise of power by senior managers was very real and reduced first-line managers' ability to exercise choice in their role. Indeed, the example of Jamie proactively responding to the body language of the Operations Manager illustrated how sensitive first-line managers can be to their line manager's wishes. This was not a sole example and was supported by Susan's anticipation of criticism after she had made a decision without consultation, and the direction for Patricia to sit in a specific seat, not at the head of the row for surveillance. There was a sense of resignation that as a first-line manager they had little power, which might explain why they did not wish to discuss the topic. Alternatively it may have been due to them not wishing to see their role so constrained as to be meaningless. In addition, their developed values of consideration for others would be challenged by the imposition of dominance by others. To illustrate this point, my interpretation of their discourse is "that is not how I wish to behave, so why do others?" This was not actually spoken by any participant.

Interestingly, the first-line managers recognised that staff below them had power. Call advisers could choose not to focus on their work consistently, and there was little that they could do about it. Christine's invective against some of her staff was very revealing.

Although she made prejudicial and generalised comments about younger workers, she discussed how some of her staff made excuses far too easily for not attending work. This was anathema to her own values of 'wanting to do the right thing' and 'work hard' in a 'good job'. Any views that appeared to contradict the personal mores of the participants were often met with an emotive response. As such there was a limit to the *accommodation* that they would tolerate, which indicates some use of personal agency.

Vignette five illustrates subtle nuances in the use of power. Of all the participants, Bob was the most phlegmatic about power. He saw its pragmatic advantages and indeed had seen power being used in a positive way. He recognised the limitations of his status and that making a direct challenge to expressions of power by seniors would not be effective. He allowed an unsatisfactory circumstance to continue so that the manager would recognise the error. He used the 'power' of his knowledge and experience, to resolve a situation his way.

This agentic action could arguably be seen as mischief making. Perhaps Bob did not truly ascribe to the public sector manager ideal of "persons with very highly developed intrinsic

Vignette 5 **Accommodation – *"Stop trying to take control and remove the levels of responsibility"*. Bob**

Bob saw power in operation in different ways by the senior managers, *"you get two different management styles within the same hierarchy. It can be disconcerting"*. He defined power as ". . . *the ability to be able to manage that process and that outcome and to be in control over it*" and identified power as resting with the senior managers to whom the first-line managers must accede. He saw them using their influence in different ways; some used it show what he described as their *"compassionate side"*- managers who ensured that managers were supported and were provided with the resources needed to perform the role to a good standard. In contrast, there were others, one in particular that he did not name, who used power to further his personal aims and secure his position, irrespective of the consequences on others. These type of managers made insistent demands and just repeated their instructions if they are not carried out.

Bob felt that first-line managers had very limited power. Power may have existed a few years ago, but has since been eroded. He argued that he did not make decisions, had no involvement in the selection of new staff and was increasingly distanced from disciplinary processes. The first-line managers wrote reports for others to progress any action. His personal power, if indeed he recognised this, came only from his knowledge of the service routines covered by City-Access. His abilities appeared to mark him out as a reference point for others, which he saw as a symbol of power. However, as knowledge was increasingly stored in online files accessible to all, Bob saw his source of power fading incrementally.

However, Bob recognised that there are situations when his expertise can resolve a difficulty. On one occasion, he did not volunteer a solution, but waited for the powerful senior to seek his advice directly and in so doing demonstrated to the senior managers his quality as a first-line manager resource. When senior managers over-apply forms of control, he believed issues take longer to resolve. I would hesitate to call this *schadenfreude*, but he did say *"that makes me laugh, makes me giggle, I get a little internal chuckle, a little smile"*. Perhaps this is his *quid pro quo* for the emasculation of his role and his realisation that he did have some influence, if not real power.

Interestingly, in our discussion on power, Bob did not talk about the power of his immediate line manager, the Operations Manager, only the most senior managers. Perhaps he was uncomfortable to recognise the close proximity of power to his level as it may have devalued his own contribution.

motivation to work in the public sector" (Frey & Benz, 2005, 382). Maybe he did not share the core values of others as he had significant experience of working in the private sector and had possibly a more instrumental approach to his work. His action could have resulted in a delay that may not have been in the best interests of a member of the public.

Despite being subject to power, the participants accepted the inevitability of their situation. If they wanted to *aspire* to a promotion position, then why challenge the very approaches that they would need to take when they assumed that role? If they did not have specific career aspirations, then continual challenges to authority could make their lives difficult. A key learning point that they recognised from the previous two stages had led to the conclusion that conflict would lead to unhappiness; *accommodation* of others' views leads to equilibrium in life. A consequence of this was a reduction of personal agency, but the removal of constraints to increase personal freedom introduced risk which may have threatened their retention of 'a good job' and being economically independent. Each participant had found a job where the values they had developed in earlier life and which gave them personal ontological security were coincident with the values required to perform the role of a first-line manager.

Vignette six illustrates how Trevor had throughout his life adopted an instrumental approach to *aspire* to exercising choice over his actions. He worked harder to gain the attention of a special teacher. He took a job to satisfy demands from his mother. Securing a job in a contact centre was not at his instigation, yet when he found that he enjoyed the work, he took control of his future, apparently for the first time in his life. Having found his métier, he had the motivation to work in a focused way to achieve his aim of being a first-line manager. Trevor spoke about the importance of being happy in both work and home and recognised his lack of ability to influence his future; his *aspiration*s could not be matched with real jobs. Continuing to *aspire* could only lead to frustration, so perhaps in this third stage, all the participants' aspirations were more realistic and redirected the use of agency away from work to home and family. However, he had found happiness, or at least contentment in his role as he saw the opportunity to use his well-developed 'life skills' in his job.

With future job positions being increasingly limited, all the participants faced a future where their ability to influence their futures were curtailed.

Vignette 6 Aspire – "to be honest, I wanted to be a manager within 18 months" **Trevor**

Trevor accepted that whilst at school he did not work hard as he did not enjoy it. He had shown the ability to apply himself to work, but this was only for a particular female teacher who he respected; *"we were on the same wavelength kind of thing".* Trevor's lack of consistent application resulted in the teacher becoming frustrated with him. He drifted into a college course which proved to be no more successful and he eventually dropped out and drifted into various retail jobs in the city centre. He had no real aspiration and only took a job to *"keep my mother of my back"* and earn a living. He enjoyed the work in retail as he was interested in the products sold which were aimed at young people. This helped him to recognise a link between his engagement with something and learning; "*it was only once I started doing something that got me motivated to learn"*.

A family member secured him a job in a contact centre and he enjoyed the Monday to Friday work as he was able to socialise with his friends at the weekend. He enjoyed contact centre work and applied for other jobs as he wanted to make a career in the sector. He was offered two positions, but decided to join City-Access in an advisor role. At that stage in his life, Trevor had the aspiration to secure the role of a first-line manager within 18 months of starting. He stated this as a performance objective in his first one-to-one review with his manager. Such was his aptitude for the work in hitting all of his other targets that within four months he was promoted as a team deputy. Within 14 months he became a team leader, exceeding his personal goal. Whilst he recognised that "it was a case of right place right time", he had contributed to his 'luck' by preparing thoroughly in performing his job role and stating his ambition early in his employment. Trevor's sense of planning, inherited from his parents channelled his aspirations. He liked to be able to look ahead and consider his future options. His personal sense of control drove him to achieve his goals and he disclosed that mapping out his immediate future gave him contentment.

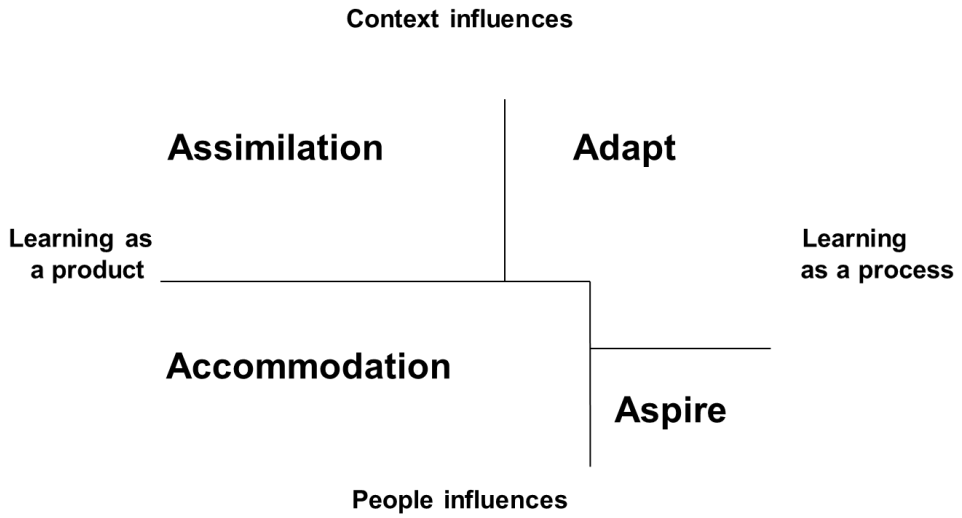
His transition into a first-line manager position was relatively straightforward as he drew closely on the skills learned as a child; *"you don't just meet people in work, you don't just talk to people in work. They are social skills or life skills, you use every day"*. As a first-line manager Trevor had conducted disciplinary interviews. His professional approach, always involving careful preparation, and his sensitivity to others (emotional awareness) meant that he remained on good terms with those colleagues afterwards.

For the future, he *aspired* to an Operations Manager position, "*there is always the chance of the promotion isn't there",* and had the realism to recognise that there are fewer opportunities higher up the organisation.

Summary of manager development

It is unsurprising that as the context and people influences have changed in the first two stages that the conceptual framework also needs a further review. The final stage is no different as analysis of the data revealed more of a balance between the two context influences and *accommodation*; in turn, this reduced the potential to exercise personal agency. This is included as figure 7.3 and shows a further reduction in *aspire* and the loss of agency and the growing influence of both *assimilation* and *adapt*. The largest influence remained *accommodation*. This study has confirmed my own experiences of manager training and education discussed in chapter two in relation to the work of Rosemary Stewart (1982). First-line managers were often disillusioned to discover how unempowered they became following promotion, with some preferring greater freedoms of non-manager work.

Figure 7.3 Four modes of learning in manager development



7.5 Situated learning theory

Thus far in this chapter, the interpretations have related to the empirical data from the study. A significant implication of the analysis illustrated a limitation to an established theory that was introduced in chapter three. In situated learning theory, Lave and Wenger (1991) suggest that learning is a route from legitimate peripheral participation as an outsider to mastery in a context as an insider in a community of practice. This summary statement needs ~~deconstructing~~ exploring to consider a number of implications of this theory germane to this study. Firstly, a limitation in situated learning theory is the lack of clarity about how the process of transformation to mastery actually occurs. This study has shown that learning occurred in a number of contexts as individuals participated in multiple communities, home and school, and friends and work. Experiences of differing work contexts added to the richness of learning. 'Outsiders' became masters by following three stages of development that traced the life course. Analysis of the data themes has revealed that the attributes required to perform the role of a first-line manager in City-Access were agglomerated in three distinct stages. Learning 'appropriate' ways to behave at home and school in formative development gave the participants the ability to face new contexts with confidence, and this would nurture their continuing development. This confidence was secured by approbation from parents and teachers. Work experiences presented opportunities for the participants to experience first-hand an eclectic range of manager styles to inform their own style as a first-line manager. The route to mastery began not on appointment as a manager, but as a child. However, the term 'mastery' implies supreme proficiency in a role. The participants only felt

secure in their position as a first-line manager after a period of some 18 months in the role suggestive of the idea of an 'emergent manager' (Watson & Harris, 1999; Chia, 1996). Although each had confidence in his ability to perform the role at the outset, experience affirmed that they were indeed first-line managers. They continued to learn and share knowledge and experiences as a community of practice.

Secondly, implicit in the theory is the suggestion that when a new situation is encountered, the learner is an 'empty slate' to be inscribed through experience of participating with others. This proposition was not upheld in the study as Lave and Wenger (1991) appear to deny the existence or utility of prior experience. When the participants assumed their role as a first-line manager, it was precisely the attributes learned in their earlier life experiences that enabled them to endure; none of them foundered. The attributes they had progressively developed, and with which they were confident were entirely appropriate to the specific nature of the first-line manager role in City-Access. Rather than beginning a totally new learning process on appointment as a first-line manager, their earlier foundations gave them the learning platform upon which to perform the role in a new context and continue their ongoing development.

7.6 Identity

In chapter three, I explored the relationship between learning and identity and suggested that in contrast to the views of a number of writers who suggest that learning changes identity (Lave & Wenger, 1991; Elkjaer, 1999; Hill, 1992; Billet & Somerville, 2004), the identities of the participants in this study actually did not experience a fundamental change. Additional behaviours were added as outer 'layers' without jeopardising the core that they had already established; the participants remained true to their "ontogenical dispositions" (Gnaur, 2010, p.237). The 'onion skin' model of core values and behaviours shown in figure 3.1 is adapted to illustrate the layers of identity, shown in figure 7.4. As such, becoming a first-line manager did not introduce the risk to their ontological security that might occur had their identity changed. As first-line managers, the identity work in which they engaged merely added different tasks and responsibilities, although those who had previously worked in other contact centres felt that they were only accepted as managers when they were able to demonstrate their proficiency in the work of their team, a view supported by Hill (1992). As "bricoleurs who use diverse materials to construct identity" (Down & Reveley, 2009, p.394), the participants merely added tasks that can be labelled 'manager identity work' to their repertoires. Yet an analysis of the work of first-line managers in City-Access against the nine elements of manager activity identified by Hales (1986), suggests that they are really no

Figure 7.4 Layers of identity

more than supervisors, echoing the views of Wallo et al., (2012). This is shown in table 7.1 with the areas where they acted as managers highlighted in blue.

Table 7.1 First-line manager activity in City Access

Prescribed by Hales (1986)	**Actual practice**
(1) Acting as figurehead and leader of an organizational unit	Six of the participants self-described as team *leader* but their role as leader and figurehead was limited to defending their staff.
(2) Liaison: the formation and maintenance of contacts	Most work was required to go via the Operations Manager, so there was little need for the participants to develop their own networks.
(3) Monitoring, filtering and disseminating information	They did act as a conduit for information.
(4) Allocating resources	All resources were controlled centrally.
(5) Handling disturbances and maintaining work flows	Responding to the changing patterns of incoming calls was handled by a senior manager.
(6) Negotiating	There was no requirement to negotiate, they merely accepted instructions
(7) Innovating	There did not appear to be any incentives for managers to introduce new ideas.
(8) Planning	There was no requirement to contribute to planning. This was handled by senior managers.
(9) Controlling and directing subordinates.	They did have some operational control over the call advisers for mundane issues. Staff discipline was handled by specialist human resources staff

The combination of this limited scope of work was moderated by regulation from the work context. They "jointly form the bases of identity construction, i.e. the process of being and becoming" (Pezé, 2012, p.241). Regulation of the Team Leaders' work had many of the

characteristics of control proposed by Alvesson and Willmott (2002) as shown in table 7.2, which is adapted from figure 3.10. The evidence presented in blue font illustrates the identity work that was coincident with their developed values and behaviours. The other controls were, as commented earlier, simply accepted without difficulty.

Table 7.2 Dimensions of organizational regulation

Means of control	As evidenced by
Defining the person directly	The job title was given as team Leader, although half the group self-described as team manager.
Defining a person by defining others	They were distinguished from other groups of workers titled call adviser, operations manager.
Providing a specific vocabulary of motives	All spoke of the wish to be seen as "professional" and support their support staff to deliver good service to the general public.
Explicating morals and values	City-Access had a mission and values statement that was used in the performance management process.
Knowledge and skills	There was a prescribed manager learning curriculum, but not all had completed this.
Group categorization and affiliation	The cohort as 'us' were distinct from 'them', both senior managers and support staff. They were positioned 'in the middle'. . .
Hierarchical location	. . . of 'the pecking order'. They were neither strategy makers, nor operational workers.
Establishing and clarifying a distinct set of rules of the game	They had developed a distinct way of operating their role being sensitive to the needs of the Operations Manager. This was not specified in their role profile.
Defining the context	Their profound belief in being a public servant and being able to use the values and behaviours learned throughout life.

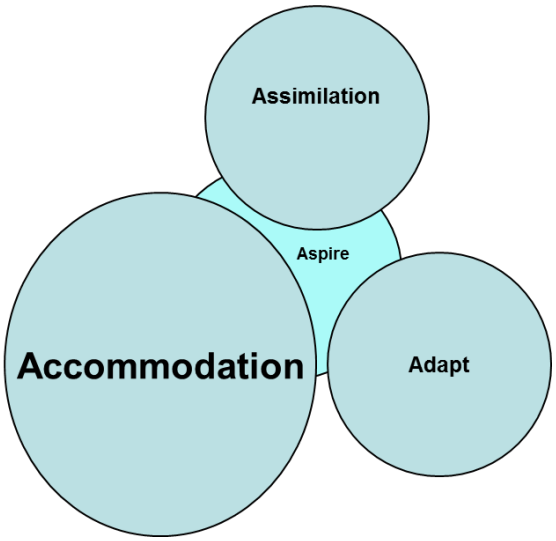
All except one of the participants, Christine, felt at ease and comfortable to describe themselves as a manager in City-Access. Their "inside-out view" (Reedy, 2009, p.92) of their identity, together with my 'outside-in view' as observer coincided; their personal values and behaviours, their idem and ipse identities had a strong affiliation with those they exercised as first-line managers. If their identities had changed due to their role as a first-line manager they might have been able to say something about what it was previously, and then what it had subsequently become. This was not the case when they became first-line managers, as additional habits were incorporated into their behaviour. There was no fundamental change, although others may have perceived that they had changed. They continued to demonstrate the attributes learnt in early life and remained true to the ideals and values that had been inculcated formatively and developed occupationally. Their manager identity was rather an uncomplicated picture of them as the people they were comfortable to be outside work

simply performing manager duties in work. This accords with my definition of a manager expressed in chapter two that a manager is an individual who self-describes as a manager.

7.7 Revised conceptual framework

At each stage of development, the conceptual framework introduced as figure 3.1 has needed to be modified to reflect nuances in the data analysis. As the model has undergone three transformations, its fundamental utility is now open to criticism. The complexity of learning was illustrated clearly in the messy framework figure 3.5. Whilst the progressive resizing of the quadrants has reflected the unfolding of the narrative in each specific stage of development, a summary model is needed to articulate more clearly the cumulative effects of the influences in the three stages. In the tension between structure and agency, it is evident in this study that structure predominated. Figure 7.5 is presented as the model that represents the relative weight of the four modes of learning to become a first-line manager. The dominant influence is *accommodation* with relatively equal influences from the context influences of *assimilation* and *adapt.* What is sacrificed is individual agency, *aspire*, as this is constrained by the domination of the other three controls.

Figure 7.5 Learning to become a first-line manager through the life course



7.8 Chapter summary

This chapter has explored the implications of the data analysis and proposed discoveries that relate to the research objectives:

1. Clarify the nature of the first-line manager role in a specific contact centre
   It has shown that the nature of the first-line manager role in City-Access is to supervise and coach call advisers and respond to and anticipate the demands of the Operations Manager

2. Identify how individuals learn to become a first-line manager
   An individual learns to become a first-line manager through three stages of development

3. Discover influences that affect learning to become a first-line manager
   These stages do not change the individual's identity, identity develops and receives affirmation despite to change through the life course. The identity that they had established before becoming a first-line manager was exactly what was required

4. Examine links between learning and identity
   Finally, influences on learning arose from both context and significant people. Individuals *adapted* to dominant cultures, they found an *assimilation* to prescribed protocols and an *accommodation* to the demands of significant people. This curtailed ability to *aspire* and exercise their individual agency.

The journey of Phillip becoming a first-line manager can now be illustrated as an exemplar vignette of my thesis. The final chapter will present conclusions from the research and identify its contribution to the corpus of extant knowledge and propose areas for continuing research.

Vignette 7 **Philip's journey–** ***"it was never to be a manager, I wanted to be a footballer".***

In his formative years, Philip did not dream of becoming a manager. He had no clear idea of his future career beyond a dream of being a footballer, or more realistically, a vague notion of working in a business; *"I don't think you fall into what you thought about at school, they are just ideas"*. He credits the drive and enthusiasm he applied in his work as a manager to accommodating the influences of both parents and teachers. He learned *"that you should work hard, you shouldn't be like a lazy person, you should be the one who gets on and does things. If you are going to wait for someone to give you something, you are not going to get it*". He learned that rewards only come from his own effort, which developed in him a sense of equity -*"the more you give, the more it bounces back"*. He has a keenly developed sense of politeness and consideration for others.

He left school after completing his GCSEs and made his own choice to work in the public sector – *"it was always the council"*. His first job was a filing clerk before becoming a Benefits Assessment Officer. These two roles afforded him the opportunity to experiment with his potential, before he settled into a job as a Customer Services Adviser. In his occupational experience, he found the need to *"learn to do things well, which goes back to when you were a child"*. He assimilated imposed restrictions on his work without difficulty, accepting them as a natural part of the employment exchange as he gained development through NVQs in return. He also learned about being a manager through observing how he was managed. It was not always a positive experience as he was subject to the power of others. One manager told him, *"remember, I have the choice of whether to give you this role or not"*.

Philip talked confidently about how his life experiences, not his education had helped him to become a first-line manager. He contrasted his manager style with others who are more highly educated and who *"can tell you why things are done in a certain way because they read it in the book, but it does not mean that they can actually do it. I think you can't teach someone to be a manager, you can develop someone's skills and personality more than teach it. There is not a book that you can write that would say "if managing person A . . . use paragraph 1"*. His early experiences in the first-line manager role were not easy. A colleague with whom he was friendly barked at being given work; "*effin hell, you have changed, you've only been in the job two weeks. You are one of them now".* Philip had clearly crossed a line in the perception of his co-workers and had to adapt quickly to the context. He enjoyed a good network of mutual peer support and valued the community of learners; *"what you do is to take a bit of each person's skills to make the group stronger. I think the whole is so much more than the sum of the parts by joining together, so you learn by the fact that you support each other and know that no one is the same."*

Philip assimilated the performance management systems into his work, but was rather cynical about it. He accepted that the process had to be followed, but he viewed it as just an example of bureaucracy. He illustrated this by describing how he was required to discuss how the call advisers demonstrated the corporate mission and values. The values *"were basically made up just to fill in the gap on the piece of paper, instead of just having a more down-to-earth conversation"*.

He defended his team against the power of the senior managers as a form of self-protection; *"if they* [senior management] *say anything to you, you are being told that your team is not performing, by default, you are not performing".* However, he chose not to exercise power when managing his team; *"power can be a bad thing. When you ask somebody to do something when you need help, power doesn't get you help"*. His manager style was characterised by good manners, saying please and thank you

Presenting an image as a manager, *"being professional"* was important to Philip; *"so you come in, you are on time when you go to work, you dress smart, you are ready to go"*. He preferred to wear suits, but adapted to the dominant norm of 'smart, casual'. For the future, he recognised the restrictions on his future career development and also the dangers of over-promotion. He preferred a step-by-step approach *"because, you then have an understanding of each role and understand how the job of work and all the pieces of the jigsaw fit together"*.

In terms of who he believed he was, his idem and ipse identities appeared to be very close. He acknowledged that his job *"is part of who I am*. *"As a person I am . . . the question is so open it is hard . . . I am a person who likes to enjoy life and get things done and hopefully get through whatever has to be got through in a day, in the nicest, best way possible. You can obviously go down the lines, but really, I would like to be someone who is respected and also be able to have a bit of a laugh and a joke, but at the same time gets what needs to be done, done"*.

Philip did not run his own business, he was not a footballer, but he was a first-line manager.

CHAPTER 8 CONCLUSIONS AND IMPLICATIONS

8.1 Introduction

The aim of this thesis is to discover how an individual learns to become a first-line manager in a contact centre. To achieve this broad aim, four research objectives were specified in the introductory chapter:

1. Clarify the nature of the first-line manager role in a specific contact centre
2. Identify how individuals learn to become a first-line manager
3. Discover influences that affect learning to become a first-line manager
4. Examine links between learning and identity

This chapter initially presents conclusions to these objectives which flow from the implications of the data analysis undertaken in the previous chapter. This analysis synthesized research interpretations in chapter six with the literature in chapters two and three. The chapter then identifies the four contributions that this work makes to the extant body of theory; individuals become a first-line manager by following three stages of development in the life course; learning does not necessarily change identity; teachers make a significant contribution to the development of future managers; and the messy terrain of learning has been 'tidied'. The chapter concludes with a critical reflection of the research process before making suggestions for future research.

8.2 Main interpretations from the research

Clarify the nature of the role of a first-line manager in a specific contact centre

Popular notions of management found in "endless airport book shops" (Parker & Pearson, 2005, p.95) suggest a dynamic, heroic figure who spends a sixteen hour day in internal meetings, making strategic decisions, travelling the world networking with like-minded people, and infusing his staff to achieve extraordinary results. Grey (2009, p.46) links this with social status by commenting that "we live in a world where to be a manager is, in many people's eyes, to be recognised as a person of some consequence". Whilst there are examples of individuals leading frenetic lifestyles, for example Jack Dorsey of Twitter, and even Liverpool-based students that I teach who work 80 hours a week, for the five million managers in the UK (ONS, May 2014), life appears to be much more mundane. The critical

analysis of the literature about 'manager' and 'manager work' in chapter two concluded that there is no universal definition for the role of a first-line manager or agreement as to the range of activities that fall within its remit. The role is defined and its constituent tasks are both specific to a given context. This has been shown to be the case in City-Access. Of the nine activities that Hales (1986) recognises as 'manager work', only two were undertaken by the participants; they passed down information they had received from the Operations Managers in weekly team briefings with the call advisers, and they controlled and directed the work of their subordinates. This is summarised in table 8.1, which is taken from table 7.1. The order of executing these duties was very tightly prescribed and controlled through a detailed list of activities specified by the Operations Managers into time order - daily, weekly, fortnightly, monthly, quarterly and annually, that was shown in table 4.4. The two listed duties that were neither time-bound nor subject to performance targets (peer buddy and lead role) did not receive the same priority and were rarely undertaken. None of the participants acted in a formal capacity as a 'peer buddy', and there were also no examples in the data of a first-line manager acting in a lead role.

Table 8.1 First-line manager activity in City Access

Prescribed by Hales (1986)	Actual practice
(3) Monitoring, filtering and disseminating information	They did act as a conduit for information.
(9) Controlling and directing subordinates.	They did have some operational control over the call advisers for mundane issues. Staff discipline was handled by specialist human resources staff

The Foucauldian gaze of the Operations Managers over every aspect of work confirmed their dominance over the participants. The Operations Managers exerted greater power over the direct reports than that exercised by the first-line managers over call advisers. The use of information technology reinforced this control, echoing Burrell's (1988, p.233) view that technology reflects "the architectural design of the panopticon". No participant felt powerful and discussions about power generated hostile reactions, as evidenced by Maria, as its use did not concur with their values. The practice of the first-line manager role within City-Access emphasised status, power and control and regulation.

The first-line managers in City-Access had limited authority to act as managers as their role was substantially that of a supervisor of the call advisers, echoing the view of Wallo et al., (2012). Their daily activities consisted of responding to queries from the advisers, monitoring their calls and conducting subsequent one-to-one coaching sessions, as well as formal reviewing call adviser job performance. They also personally handled calls that had been escalated from the adviser, either because the adviser was unsure about how to resolve an

issue or the caller had specifically asked to speak with a manager. Only two of the participants, Maria and Patricia hesitated to identify themselves as a first-line manager. The others had no hesitation in self-describing as a manager either for ontological security in the role, reached through the coincidence of their idem and ipse identities noted in chapter seven, or their lack of understanding about the manager role. The adjectives they used to describe how they wished to be perceived in their role (*"professional", "approachable", "reliable", "knowledgeable", "trustworthy"*, and *"encouraging"*) could equally apply to a non-manager work colleague, or even a friend. They are not attributes of a stereotypical view of a manager identified in chapter two as a person who translates strategy and policy into practice, responds to change, and to leads and directs support staff. Whilst such attributes might have applied to some senior managers, it was not a feature of the first-line manager role in City-Access.

The attributes needed to perform the role were similarly ordained. City-Access operated a corporate-specific list of eight leadership competencies shown in table 4.5 that included 'builds and delivers the vision' and 'makes it happen and sees it through'. Five of them related directly to performance issues that did not permit the exercise of any first-line manager discretion. Of the three areas where individuality could be exercised (create a learning culture, pioneer new approaches and enable a culture of open communication), open communication was widely practised amongst peers through the examples of sharing knowledge. This made a contribution to a learning culture, but this attribute included the expression 'champions learning and development', but no detail was given on how this could be achieved. It was only when the task and the method of performing it were known that the participants were able to cope. Lack of clarity in either the task or method resulted in the task not being attempted. There were in addition no incentives to encourage them to try, or reward for showing initiative. It appeared to be the case that the greater the regulations over work, the greater the tendency for the first-line managers to presuppose that there must be even more restrictions in place, reducing the opportunity to exercise discretion (agency). As first-line managers were not required to exercise their judgment, they simply followed instructions of the more powerful, to which they had been accustomed since birth. As such the participants were little more than "manageable commodities" (Burgoyne, 1993, p.10).

Despite the range of structural and people controls, the first-line managers were content in their role as was seen in the case of James. Their consensus view was that this was reached after a period of around eighteen months in the role. They were more willing to accommodate decisions taken by the Operations Manager than take their own decisions as illustrated in Susan's case: she expected a reprimand for taking a decision without

consultation and approval. The operation of controls limited the possibility of agentic responsibility as the role had a limited focus. The participants understood the imposed controls and in the same way that these gave them security in earlier life, controls as a first-line manager gave them confidence to perform the role.

In sum, the first-line manager role in City-Access was a supervisor of call advisers who gave advice and guidance to the public. By resolving issues and queries, the call advisers made a difference to people's lives and as supervisors of the call advisers, the participants were a vital part of that process. In chapter two, I noted a question that I had asked the CEO - why he paid staff £28,000 to manage staff that are in turn managed by technology. His answer was "I employ them to make a difference", an answer I found unsatisfactory. The role was a limited supervisory function of staff who made a difference to the lives of the public over the provision of local authority services.

Identify how individuals learn to become a first-line manager and discover influences that affect learning to become a first-line manager

The interpretations from this study have shown that learning cannot be considered in isolation from its influences. Learning has been revealed as a complex series of processes through which individuals adjusted their behaviour in response to the imposition of controls. Learning to become a first-line manager in City-Access was a response by the participants to influences in three clearly defined stages in the life course. These three stages resolve two criticisms about situated learning theory (Lave & Wenger, 1991) that were considered in chapter three. Firstly, the interpretations illuminate how an individual progresses from legitimate peripheral participation to mastery. The three stages of development, formative, occupational and managerial are the route to mastery. Secondly, Lave and Wenger (1991) are clear that learning takes place in a context, and their use of illustrative vignettes suggest that they intend learning as occurring in a specific occupational setting. This study has shown the context was much broader than a workplace context: it was the life course provided the contexts for learning. Learning did not occur in a single context, it was the agglomeration of three contexts that enabled the participants to become first-line managers. To varying degrees, all four modes of learning identified in chapter three were used, *accommodation, assimilation, adapt* and *aspire* to become first-line managers. The relativities between the influences changed at each stage of the life course and were represented by progressive modifications to the original schema, figure 3.6. However, use of individual agency was consistently and progressively subsumed by the other modes.

The dominant influence in the first stage of development was people, there were no significant references to the influences from the context. The genesis of becoming a first-line manager started in early life when the participants absorbed values and behaviours of their parents. Formative development was characterised by the need to accept the views of and to please elders, the more powerful, and to act in ways that were consistent with equity and fairness. These have been referred to as 'life skills' (Danish et al., 1993). In their formative development, they reached an *accommodation* with the wishes and demands of their parents as they learned the need to have a purpose in life, part of 'doing the right thing' and being aware of the consequences of their actions on others. In so doing, they learned to regulate their behaviour through the exercise of emotional control, a key 'life skill'. When they entered school they found constancy with these parental values from teachers, who further reinforced their achievement drive and the need not only to work hard but to understand the relationship between effort and achievement. This was revealed by the example of Patricia who only received praise following effort. This is an interesting conclusion as there is no extant literature that identifies the contribution that teachers make to the development of (future) first-line managers. Their intentions to *aspire* to a purpose in life were guided by their own developing interests and support and guidance from parents and teachers.

As noted in chapter six, there was limited data about the second stage, occupational development. People influences continued to be more important than context when the participants started work. Context influences were limited to *adapting* to working with others and an *assimilation* of work constraints. Experiences of being controlled by a manager exposed the prospective first-line managers to role models (Cheetham & Chivers, 2001). They observed and experienced a range of behaviours, both good and bad as in the case of Susan's *"fantastic manager"* and the physical violence used by a manager seen by Bob. Their reflections about manager behaviour, judged against the personal values they had developed, enabled them to discriminate between those that would become part of their repertory. Occupational experiences provided the opportunity to make decisions about their future roles (for example, did they wish to become a manager) and the behaviours they would need to exhibit, demonstrating the power of role models. Whilst they were subject to controls imposed through job descriptions and person specifications and wider performance management processes, they were able to experiment with the appropriateness of their values when dealing with a broader range of people from different cultures and beliefs. This was illustrated well by John who had experience of manual trades and other contact centres, including one outside the UK and discovered that his 'life skills' were respected in City-Access. They were also exposed to co-workers some of whom had significantly greater

experience of work. This could have potentially intimidated a newcomer, not least because any difficulties between people might have been handled in novel ways outside of the experience of the early professional. James reached an *accommodation* in a situation when he was exposed to *"an absolute bitch"*. During this stage of development, the participants essentially *aspired* to financial independence from their parents whilst contemplating, but not making firm choices over future career options. Independence was the opportunity to have fun with few responsibilities, as Bob described gleefully.

It was in the manager development phase where all four dimensions of learning were more consistently evidenced. The contextual influences placed restrictions on what first-line managers did in their role and how they performed it. They needed an *assimilation* of the controls imposed by the omnipresent and pervasive suite of management information reports and displays. These were significant distractions to the first-line managers and diverted attention from tasks on which they were working. The software would regularly 'flash' or change colour to demand attention and a response. Whether or not action was needed immediately, the participants normally did make an instant response. The participants learned to *adapt* to working in a context with peers who behaved as a community of practice, although for some the transition to the first-line manager role was difficult. Personal credibility was established by having knowledge of the specific work routines, an issue of greater importance for those who joined from outside City-Access.

As in the previous two stages of development, *accommodation* of the demands of others was the most significant influence. The first-line managers performed their role in the full knowledge that they were being observed and this could have resulted in feelings of unease. Seating position was allocated for them, as shown in chapter six and they were not permitted to customise their work area, although Louise did so in an overt way and Patricia disguised her attempts from her manager. However, the controls on the participants did not lead to inertia and withdrawal, they were accepted without challenge, although their consequences were felt personally in a physical way and led to feelings associated with having experienced a boxing match. Even this did not produce a negative reaction as it was simply accepted.

Learning was supported by formal development interventions. It was of value to the participants for knowledge of how to operate people management policies such as sickness absence and disciplinary procedures. In producing a generic menu of learning topics (courses), the Human Resource Department (HRD) did not show sensitivity to the individual backgrounds and experiences of learners, nor the situated nature of learning to become a first-line manager. It proposed training courses in the spirit of a cure to make an individual

better, based on a deficit diagnosis of learning (Harry & Klingner, 2007). There did not appear to be a questioning of whether 'the patient' actually needed treatment! Such practice did nothing to enhance the professional standing of HRD and actually supported cynical views of HRD as a waste of time and unnecessary (Kumpikaite, 2008).

In sum, learning to become a first-line manager in City Access was a response by the participants to their experiences in three stages of the life course. They participated with others but deferred to the 'more powerful' whose values and behaviours they absorbed and re-enacted. The participants demonstrated my definition of learning, stated in chapter two as *conducting oneself independently and confidently in differing contexts*.

Examine the links between learning and identity

In chapter three, a clear link between learning and identity was established from the literature and typified by Elkjaer (1999, p.81), who suggested that "the learning process involves learning an identity". This is suggestive of learning a *new* identity which is firmly contradicted by analysis of the data. Indeed, Hill (1992) is explicit in the case of becoming a manager which she described as the "mastery of a *new* identity" (emphasis added). The participants in this study did not undergo a fundamental change in their identity when they assumed the role of a first-line manager. They remained true to the identity they had developed through the life course which was reinforced and nuanced through successive experiences. This contradicts the views of a number of writers, for example Hill (1992) and Warhurst (2011).

The participants began life as potential persons in what Harré, (1995) describes as a series of 'identity projects'. Their personal identity was a negotiated *accommodation* between the wishes and desires of parents, and later of teachers, and their own self-exploration. Their idem identity (Ricoeur, 1992), their constancy throughout life was a person who conducted himself with a set of values of respect for others and a drive to be self-sufficient. Their ipse identity (Ricoeur, 1992), the ways in which they distinguished themselves from others, was a person with a strong sense of wishing to please others and equity in dealing with others. When they started work they became junior professionals and subsequently senior professionals by working alongside others who acted as role models. As was seen, James for example, became a respected environmental health officer, a role he really enjoyed. Their occupational identity also recognised an *accommodation* of their managers' wishes together with an increasing control from affordances in the work context. Their idem identity remained true to the values developed formatively.

Becoming a manager did not require them to start anew and learn a different identity, but the role merely added an extra layer to their two ipse identities. Their idem identity remained true to the previous two stages. This was represented in figure 7.4 and is adapted from the 'onion skin' model of behaviours and values (figure 3.1). They were capable of performing the first-line manager role as their ipse identity had great consonance with their personal values. The persona (Jung, 1967) that they presented as a first-line manager, their 'character' (Ricoeur, 1991) was their idem identity with their ipse identity revealed by performing additional manager tasks. As first-line managers they spoke about a strong need to see themselves outside of work as somehow different to their image in work. Whilst they struggled to articulate the differences, or in some cases chose not to reveal them to me as in the case of Christine, they described how it was important to them that their identity was not subsumed by their job or indeed lost completely. They declared a need to separate work and home to retain a personal self. My conclusion contradicts their assertions; they did not have a strict separation between their home image and work, the two coincided effectively and enabled them to perform the role. The image, values and behaviours that were important to them outside of work were exactly the attributes of a first-line manager in City-Access. The vignette of Philip in chapter seven illustrated this point. Through this consistency, they retained their personal integrity and ontological security, and the respect of their teams. The participants were not clones of each other as they had individuality shown through the different knowledge they contributed, but they were consistent with the definition of identity that I stated in chapter three as *the confident presentation of self in a circumstance where the self is distinguished from others*.

In sum, learning had an influence on identity but this was an additive process as new experiences were encountered. There was no sense that the first-line managers jettisoned an identity that had been created previously and replacing it with a new and different identity.

Conclusion of the research objectives

Each of the research questions have been answered by using the justified abductive strategy. This has meant that some literatures have been helpful and directly relevant to the context of City-Access. In other places, analysis has exposed lacunæ in the extant literature. These will be identified in the next section.

8.3 Theoretical contributions of the study

This thesis has drawn on a number of theories of learning to develop understanding of how the participants became first-line managers. The orientations to and metaphors for learning,

together with structural and agentic influences were developed into an analytical schema that has proved robust in revealing a clear development route through the life course for individuals to become a first-line manager. Whilst these interpretations may have limited generalizability as justified in chapter five, their transferability or relevance to other contexts can be considered through analytic generalizability whereby interpretations are generalized "to some broader theory" (Yin, 2009, p.43). This has been achieved in this thesis. How the interpretations might "be used as a guide to what might occur in another situation" (Kvale & Brinkmann 2009, p.262) is part of the future agenda for research. If another contact centre imposes strict restrictions on what and how the first-line manager operates, then through assertational logic I believe the interpretations from this study to be relevant elsewhere. The conclusions have 'meaning fulfilment' in a Husserlian sense as they match my experiences from the field and understanding through the literature. There are, however, four areas where the interpretations challenge extant 'broader theory' on learning to becoming a first-line manager in a contact centre. These contributions are presented below.

Contribution one

Individuals become first-line managers in a contact centre by following three stages of development through the life course

Lave and Wenger (1991) suggest that newcomers start out on the periphery of a group and through processes of engagement in social practice become full participants. However, they neglect to consider three important issues that were revealed in this research; the context(s) for learning, possible stages in the process to mastery and when learning occurs. The genesis of becoming a first-line manager in this study has shown that the context for learning was the life course in three clearly defined stages, formative, occupational and manager development. These stages were progressive and tracked the maturation of the individuals as they were exposed to larger and more diverse groups of people – from parents, to teachers and class mates, work colleagues and customers, and finally formal responsibility for others and their work. Transition from one stage to the next stage provided the opportunity for individuals to confirm the appropriateness of their behaviours when dealing with a broader range of people. As such learning did not occur only on entering a specific (work) context; it was accumulated from experiences throughout the life course. A thorough search of the literature found no earlier studies that have identified these issues.

Contribution two

Learning to become a first-line manager does not necessarily change identity

A number of established writers are clear that learning changes the identity of individuals, as identified in chapter three. In the case of becoming a manager, they treat manager identity as a separate new identity that is formed on entering a context, which denies attributes of identity that were formed in earlier life. This point mirrors the point made above from Lave and Wenger (1991) who consider learning only to occur on entering a context. More recently, Patterson (2014, p.6) recognises that managers "do not shed their professional identities", but this view is too restrictive. In this study, the individuals did not shed their professional identities and in addition did not shed their personal identities on appointment to the role of a first-line manager. Whilst I accept that there is a link between learning and identity, this did not lead to the individuals abandoning their formers selves. In the three stages of development, individuals progressed from personal identity to occupational identity before arriving at a manager identity. Manager identity included characteristics learned in the previous two steps which provided the foundation on which a manager identity was built. Although the individuals' discourse revealed a need to keep part of themselves outside of work, in reality this did not happen. The personal characteristics of their identity built from early life were the sine qua non for the successful performance of a first-line manager role.

Contribution three

Teachers provide necessary support for future first-line managers by affirming and strengthening family values

Teachers played a role as a 'significant individual', one of the first 'authority' figures outside of the family to whom young people are exposed, in developing future managers. They reinforced family values and helped young people to develop the confidence to accept their own developing values. and explore them further to test their capabilities. Attachment theory (Ainsworth & Bowlby, 1991), as discussed in chapter three, suggested that the roots of interpersonal behaviour as an adult lie in the ties that are formed in early life. However, no study has been found that reveals the specific contribution that teachers made in confirming the 'life skills' in the formative stage of development that are essential in a first-line manager role. Their affirmation of acceptable interpersonal behaviours and values gave the individuals the confidence to deal with a broader group of people. In turn, this led the participants into the second phase of occupational development. The participants in this study identified teachers as instrumental in developing and reinforcing the attributes, those 'life skills' that were essential to making them the managers they have become and were expected by City-Access.

Contribution four

Clarify understanding of learning theory

The thesis 'tidies the terrain' of learning by linking orientations to learning with metaphors for learning and sets this synthesis into an organisational context that exerted significant controls. This was shown as a schema in figure 3.6. Using this schema for data analysis has proved robust as it retained its utility despite the modifications made to the quadrants in the three stages. Although the relativities between the four learning modes changed, no new modes of learning appeared. In chapter three I noted the views of Stewart and Rigg (2011) that attempts to produce a 'meta-theory' of learning have been slow to appear. Three years later, Stewart and Cureton (2014) suggest that such a development is unlikely to happen soon. Whilst I do not claim that the schema in this thesis is such a meta-theory, the conceptual framework developed in chapter three and applied in chapter six is a significant contribution to clarifying first-line manager development in a sector that is growing in importance to the world economy. This is not grand theory, but mid-range theorising, mode 2, recognised through "knowledge produced in the course of application" (Gibbons, et al., 1994, p.3). As discussed in chapter five, mode 2 is characterised by research which is "reflexive and dialogical" (Bresnen & Burrell, 2013, p.27) and contrasts with the perceived hegemony of mode 1 knowledge which is based on traditional, disciplinary-based knowledge.

8.4 Practitioner contributions of the study

This thesis also makes two contributions to practice. They are presented as questions for both individuals and employers to consider the ways in which life experiences suggest the suitability of an individual for the role and support his transition to becoming a first-line manager. As the questions concern the *process* of becoming a first-line manager, not the *content* of any programme, they have the potential to be generalizable to other organisational contexts. They will enable employers to extend their thinking about the identification, selection, induction and development of future first-line managers. This is a significant shift from the checklists and formulæ that I noted in chapter two which are dominant in the development of managers.

Contribution five

When an individual is considering a career move into first-line management, what 'life skills' does the candidate possess?

Conclusions from the data revealed that being a first-line manager in City-Access required 'life skills' that have been ingrained since childhood. The extant literature suggests that when organisations plan the selection of managers they aim to discover attributes acquired

through work histories. This study proposes that this is too limited and selection processes should include data from *life* histories. Candidates for first-line manager positions in a contact centre need to show that their 'life skills' are part of their character. In particular, they need to demonstrate interpersonal sensitivity and an achievement orientation, together with a sense of equity and fairness. Without such attributes being embedded, it is likely that prolonged exposure to constant interruptions by staff and invasive senior manager control will not be handled appropriately. In turn, this will affect how the individual regards the first-line manager role and whether they wish to continue. Errors in selection have negative consequences for both individuals and employers which affect the reputation of an organisation.

Contribution six

How can forms of control of first-line manager work be reduced to a minimum?

There are two forms of control that restrict how first-line managers execute their duties, the panopticon gaze of the Operations Managers and the extensive management information systems. Whilst the Operations Managers need to be accessible to their direct reports, they should not be in constant view as this can make individuals feel self-conscious. This can lead to managers making errors as they feel pressurised to perform flawlessly. This would open up a space for the learning mode *aspire* and permit the first-line managers to explore other ways to support their staff and 'make a difference'. There may need to be forms of learning and development in place for the Operations Managers to achieve this through adopting different manager styles.

Secondly, simply because the available technology can provide a plethora of reporting does not mean that it should. The reporting suite should be kept to the minimum and first-line managers advised not to have them minimised on their desks. If they are powerless to change skills sets in response to changing call requirements, then constant exposure to the up-to-the-minute position can only create unnecessary anxiety which will distract first-line managers from their work. In addition, the ceiling level display screens should be removed as they remind all staff in a very aggressive way (red flashing lights) about work load. This can distract them from giving attention to their current task as they feel under pressure to conclude it and move on to the next enquiry.

8.5 Reflections on the research and the future

The research strategy has revealed answers to the specified questions and has led to the identification of new knowledge in the field of learning to become a first-line manager. As

such, it can be considered very effective, although it was very time-intensive. More than fifty hours was spent in the field, but without such investment the participants would not have developed trust in me and the stories I was able to reveal would have been more superficial. The research methods used were thorough as they were not limited to interviews, as is often the case with interpretivist studies. This project included structured observations of the participants performing their role in context. This enabled the assertions of the participants revealed in interviews to be analysed against their observed behaviours and with the literature to reveal meaning. The most notable benefit of the observations was the identification of power in City-Access, an issue denied by the participants almost to the point of revulsion. Noting how power affected them in the course of their roles, revealed through observation of their sotto voce comments, in particular when reacting to the demands of the technology, challenged their discourse that power was not present.

For my part, my own experiences of management, both as a former practitioner and as a management educator had the potential to reduce my objectivity in engaging with the research context. My experiences are not in a contact centre and in any case cannot be considered complete and exhaustive as they reflect my "own partial and positioned viewpoint" (Maton, 2003, p.57). As such, I was mindful of the suggestion from Cunliffe (2009, p.406) that reflexivity is "how we relate to others". Issues of reflexivity are particularly important in ethnographic studies as "the involvement of the researcher in the society and culture of those being studied is particularly close" (Davies, 2008, p.4). My sensitivity to ensure that the level of rapport was appropriate ensured that the participants felt at ease to reveal their accounts of becoming a first line manager.

The effectiveness of the detailed research strategy means that in future ethnographic studies that I conduct I will use both observations and interviews. Table 5.3 based on the work of Guba and Lincoln (1994) demonstrated the evaluation processes used to judge the soundness of research. It is repeated her for convenience as it demonstrates the integrity of this project.

Table 5.3 Criteria to evaluate qualitative research

Criteria	Application in this project
Credibility	This was confirmed by the participants at the focus group meeting.
Transferability	The case is made using analytical generalization and it is for others to do likewise.
Dependability	The structured nature of the observations and the semi-

	structured interviews together with the stable nature of work in City-Access strongly imply 'repeatability' of interpretations.
Confirmability	The clear explanation of the logical development of data analysis gives confidence denying bias and distortion.

Future research

I accept that conclusions from this project are limited to one context, City-Access. Although I have tackled the issue of external validity though analytic generalizability, the themes revealed here need to be explored in other contexts. A private-public sector partnership that employs many first-line managers who started their career under an ethos of serving the public may not be typical of managers in other contact centres. Given the growth in contact centre work in the UK, together with work that was previously outsourced to the Asian sub-continent being repatriated to the UK confirms the importance of this occupational sector. I plan to conduct similar research in a wholly commercial contact centre.

Two areas of the research need to be explored in greater depth as they were surprises that emerged from the data analysis. Firstly, the significant influence made by teachers on individuals becoming future managers. In preparatory studies of the literature before entering the field, this link did not appear and needs to be explored more thoroughly to clarify the extent of the influence given the paucity of current theorising in this domain. As I work in a University, my plan for this research will include accessing our undergraduate alumni to discover potential differences between school teachers and lecturers. Secondly, limited data were revealed about pre-managerial occupational development, yet experiences at work did have an influence on individuals becoming a first-line manager, not least due to practice of their line managers. Analysis of the data mainly highlighted the influence of more powerful people, as the participants eclectically took positive and negative behaviours from their role models to use in their practices as first-line managers. The influence of peers needs to be explored further again due to the lack of current theorising. This can be achieved by conducting network analysis and constructing sociograms of the movements of managers working on the same floor. In addition, other structural influences such as performance management processes, resources available to perform job roles and expectations through the psychological contract are also potentially important factors to probe.

8.6 Concluding remarks

This thesis is an ethnographic study into how twelve individuals became a first-line manager in City-Access. What has emerged are rich stories of personal journeys of becoming that were negotiated responses primarily to people influences, but also influences in the various contexts that were experienced. The ability of a person to self-determine in their lives was moderated by the values and behaviours of significant people, teachers, parents and line managers. The journey towards becoming a first-line manager began early in life as the young person learned the *character*istics of a first-line manager position. The emphasis I have made to an everyday word reflects the recognition that individual character is a reconciliation of the idem and ipse identities. The matching of an appropriate personality to the first-line manager role was the significant feature of successful performance. As Carr (2010, p.11) has remarked "personality is part of identity, specifically individual identity".

The process of learning was a complex mix of attributes that drew on orientations and metaphors for learning, which have been presented in a succinct way as four modes influenced by the context and significant people. The flexible schema was sufficiently robust to serve as an analytical framework in all three stages. Formal learning provided some support with matters of operational procedure, such as staff attendance and disciplinary processes, but becoming a manager was learned informally and socially. In chapter two I concluded that distinctions between these two forms of learning were meaningless as there is no general agreement about the implications of the division. These interpretations are relevant to other contact centres that have similar forms of control over the actions and behaviours of first-line managers.

The thesis makes four contributions to the corpus of current knowledge in the domain of manager learning. The context for learning is the life course, structured in three clearly defined stages, formative development, occupational development and manager development. Secondly, becoming a manager did not change an individual's identity. The participants remained true to their idem identities and merely added additional duties to their repertory of skills. Their ipse identity reflected the nature of these tasks. The influence of teachers in affirming parental behaviours and values gave the individuals confidence to progress to the occupational stage of development with secure knowledge of the acceptability of their conduct. Finally, the schema summarised as figure 7.5 tidies the messy terrain of learning by revealing four modes of learning, that vary in influence depending on the context in which learning occurs.

The role of a first-line manager has been shown to be important in organisations and it is therefore important to understand how individuals can learn to perform the role successfully.

This thesis has identified how this occurs and is an important contribution to the understanding of manager development and learning, for both academic and practitioner audiences.

In the introduction to this thesis, I identified a personal aim to develop my knowledge of learning for my continuing professional development. I have achieved this aim in producing a conceptual framework, and gone further as I believe that my identity has evolved. The work I have undertaken has helped me to become a doctor. It has clarified my understanding about how managers learn and where and has shifted my thinking towards a postmodern view. My use of a constructivist epistemology has enabled me to understand the behaviours and motivations of others and to accept the world as différance. Whilst this has developed my identity, it has not changed it. I have just developed another layer to my core repertory that I believe gives me credibility in professional contexts.

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